TOURISM DEVELOPMENT IN ONTARIO:

A FRAMEWORK FOR OPPORTUNITY

APPENDICES

Balmer, Crapo & Associates, Inc.

RECREATION/TOURISM RESEARCH, PLANNING & MANAGEMENT

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A FRAMEWORK FOR OPPORTUNITY

APPENDICES

Prepared for

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Province of Ontario
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RESOURCE COMPONENTS OF PROVINCIAL SIGNIFICANCE

1. Introduction

The purpose of this appendix is to examine and describe the resource base of the Province that is relevant to the creation of a Provincial tourism development framework. The analysis of the tourism plant includes an examination of existing resources and concrete proposals for related development. As well, the usage of the physical plant is reviewed and influential future trends are discussed.

This analysis of the most significant components of the resourse base is essential to permit the identification of areas of the Province that are best suited for tourism development, and the recreation/tourism activities most appropriate for development in those areas.

The following components of the resource base have been identified and separated for discussion:

a. natural features
b. attractions and events
c. accommodation
d. information (receptive/directive) resources
e. transportation
f. service centres, and
g. population

2. Natural Features

a. Physiography

There are four major physiographic regions in Ontario (refer to Figure A-1). They are the Southern Lowlands, the Ottawa-St. Lawrence Lowlands, the Canadian (precambrian) Shield and the Hudson Bay Lowlands.

Southern Ontario contains three of the regions. The large segment lying southwest of the Precambrian Shield, the Southern Lowlands, has a wide variety of topography, generally deep fertile soils and few inland

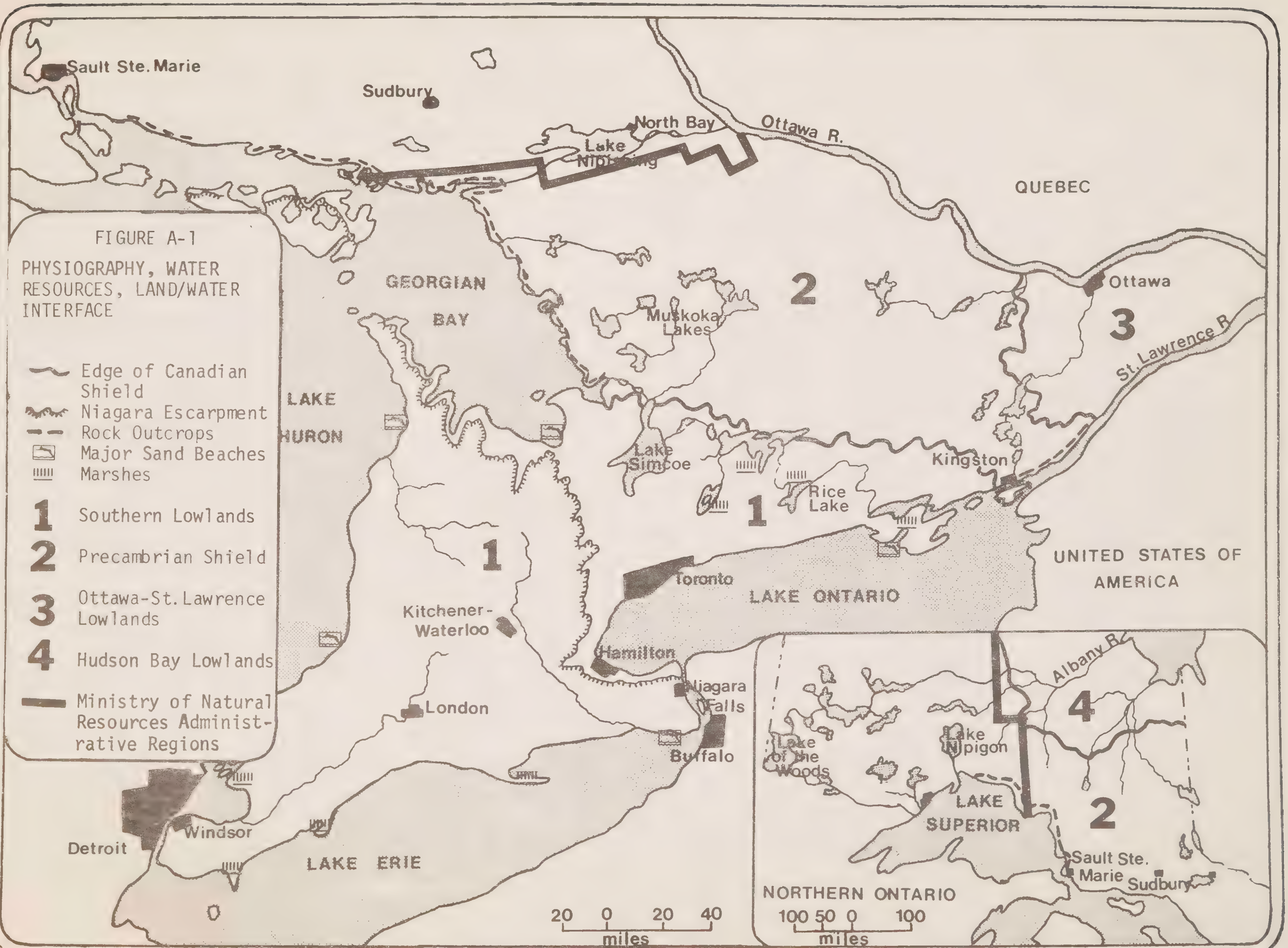

FIGURE A-1

PHYSIOGRAPHY, WATER RESOURCES, LAND/WATER INTERFACE

- Edge of Canadian Shield
- Niagara Escarpment
- Rock Outcrops
- Major Sand Beaches
- Marshes
- 1 Southern Lowlands
- 2 Precambrian Shield
- 3 Ottawa-St. Lawrence Lowlands
- 4 Hudson Bay Lowlands
- Ministry of Natural Resources Administrative Regions

lakes. The much smaller area lying between the shield and the east corner of the Province comprises the Ottawa-St. Lawrence Lowlands and is characterized by low elevation, gentle topography, shallow to deep soil mantle, and few inland lakes. The remaining subdivision, the Precambrian Shield, is largely characterized by hilly topography, crystalline bedrock, generally thin (often absent) soil mantle, and abundant inland lakes and fast flowing rivers.

In Northeastern Ontario two major physical regions exist--the Precambrian Shield and the Hudson Bay-James Bay Lowlands. The former exhibits great similarity to the shield area in Southern Ontario. The lowland area, on the other hand, is characterized by low elevation, a flat landscape, deep organic soils, large, slowly flowing river systems but few inland lakes and imperfect drainage, evidenced by the widespread occurence of string-bogs (muskeg). Manitoulin Island is unique in Northern Ontario in that it bears great resemblance to the lowland areas of Southern Ontario, particularly the Bruce Peninsula. Unlike the lowland areas of Southern Ontario, however, Manitoulin Island has numerous, reasonably large lakes.

The distribution of soils relates to bedrock geology, the glacial landform on which they are formed and climatic and vegetative regimes.

In Southern Ontario, deep fertile clays, loams and sands are found on varying topography south of the Sheild. The Shield area has generally infertile, shallow to deep sand soils over relatively infertile bedrock. Localized pockets of organic soils are scattered throughout Southern Ontario with the best known examples existing near Leamington, Thedford, Rondeau and Bradford. In the vicinity of the Thousand Islands (Bay of Quinte) and Bruce Peninsula extensive areas of limestones with shallow soil covering are evident.

Three major periods of glacial activity have modified the surficial geology of Northeastern Ontario. The soil cover of the southern half of the regions consists of shallow sandy till over Precambrian rock. Small pockets of silts andloams occur locally. A deep mantle of clay till predominates in the New Liskeard area ('Little Clay Belt' and the 'Great Clay Belt'), extending from Hearst east into Quebec. The deep soils of the Hudson Bay-James Bay Lowlands are comprised of marine sediments overlain by organic overburden in the form of peat and are associated with the flat, imperfectly drained nature of the area.

Note: Regions which form the basis of the ensuing discussions are the Ministry of Natural Resources Planning Regions (Figure A-1).

In Northwestern Ontario, glaciation during the Pleistocene period and post glacial lake, stream and wind action have modified the surficial configuration. The majority of the region is covered by shallow sandy soils over Precambrian rock. Pockets of deeper soils (loams and clays) occur locally west of Fort Frances, northwest of Dryden and northwest of Thunder Bay. The small segment of the Hudson Bay-James Bay Lowlands in the northern-most part of this region is covered by extensive bogs forming a mat of organic material over clay.

Topography in Southern Ontario varies from flat to strongly broken (Figure A - 2). The Ottawa-St. Lawrence Lowlands is a gently broken low-lying area, while the Southern Lowlands region is quite variable, featuring distinct areas of flat, gently rolling topography with some strongly broken sectors along the Niagara Escarpment. The Precambrian Shield topography ranges generally from moderately broken to strongly broken, the Algonquin Upland area being indicative of the latter.

> Most of the prominent landforms in Southern Ontario are glacially formed: escarpments in the bedrock, moraines and the spillways, eskers, and drumlins, and the higher abandoned shorecliffs of the glacial lakes.
>
> Sandhills are found along the shoulders of the river valleys and with them are great quanitities of coarse, pitted outwash. The Holstein vicinity is almost covered by gravel terraces at several levels. The Saugeen kames exhibit some of the roughest moraine topography.
>
> Drumlins are found in great abundance, some seven thousand of them, in a widely scattered pattern across Southern Ontario. Drumlins* afford some very good soils, their chief limitations being steep slopes and stoniness, and sometimes set spots due to seepage. They provide a pleasing landscape contrast to the monotony of the flat till plains.
>
> Eskers are situated in an area described by the path between Brohagen, Owen Sound and Guelph, and from Lindsay to Belleville. The biggest esker lies between Norwood and Westwood north of Rice Lake.
>
> One of the most important landforms in the region is the Niagara Escarpment, an old bedrock ridge formed by ancient wave action. It is of sufficient importance to have been placed under special administrative control by the

*Major concentrations are found at Peterborough, Woodstock, Guelph and Palmerston.

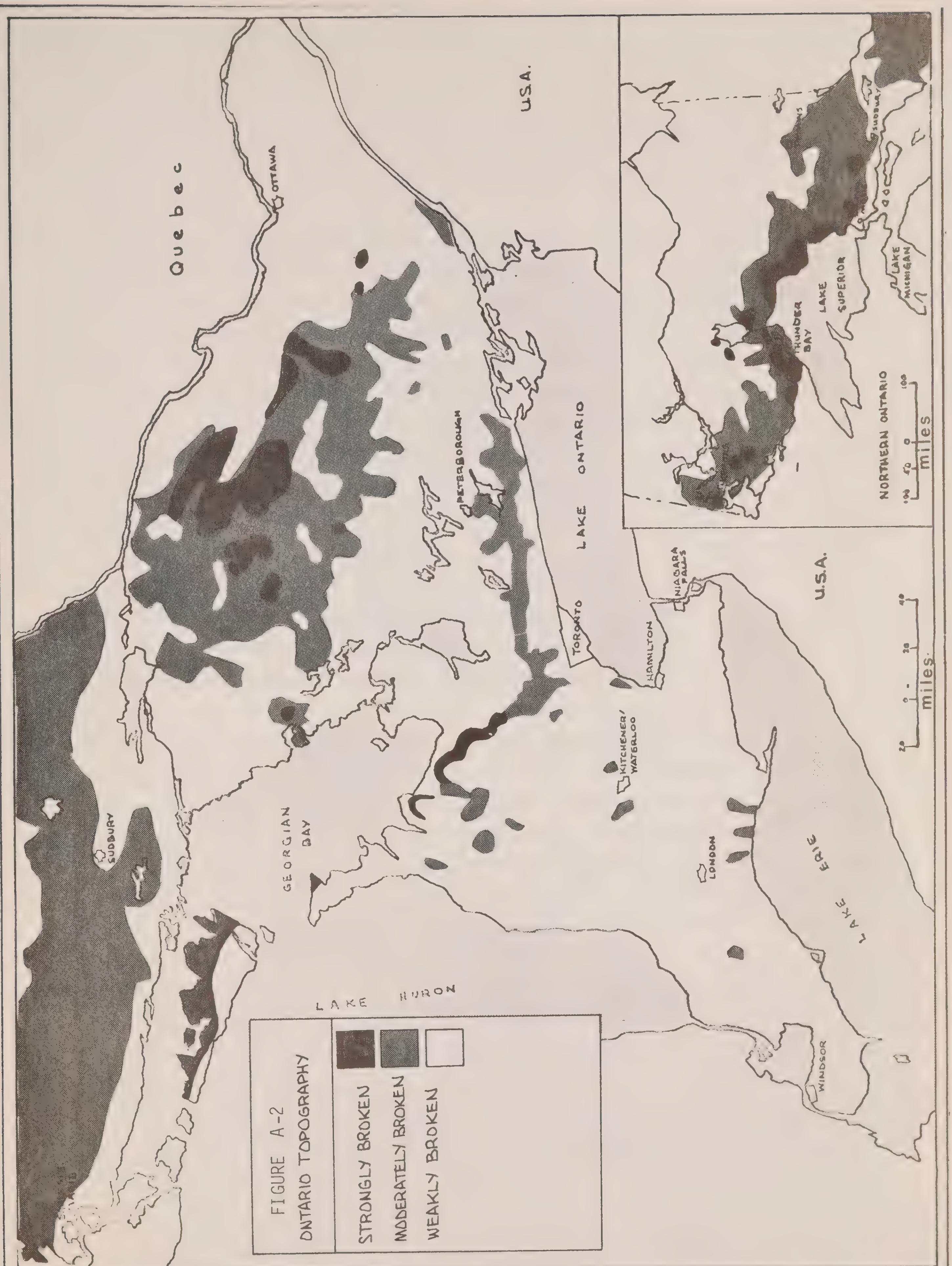
FIGURE A-2
ONTARIO TOPOGRAPHY
STRONGLY BROKEN
MODERATELY BROKEN
WEAKLY BROKEN
Quebec
OTTAWA
U.S.A.
SUDBURY
GEORGIAN BAY
LAKE HURON
PETERBOROUGH
LAKE ONTARIO
TORONTO
HAMILTON
NIAGARA FALLS
KITCHENER/WATERLOO
LONDON
WINDSOR
LAKE ERIE
U.S.A.
20 0 20 40
miles
THUNDER BAY
LAKE SUPERIOR
LAKE MICHIGAN
SUDBURY
NORTHERN ONTARIO
100 50 0 100
miles

Niagara Escarpment Commission. The area includes 1.3 million acres of land and extends 250 miles from Queenston near Niagara Falls to the tip of the Bruce Peninsula at Tobermory (Gunn, et al., October, 1975, p. 13).

The highest and most picturesque part of the escarpment* is Blue Mountain. Along Georgian Bay the escarpment forms a cliff almost at the water's edge. From Collingwood southward to Caledon it is covered by morainic deposition and from Caledon to Niagara Falls its cliff-life character re-emerges although becoming less pronounced.

In Northern Ontario singular landforms are less prominent. Throughout most of the area south of the 50th parallel, esker ridges comprised of sands and gravels are numerous. Moraines are widespread; in Northwestern Ontario a significant concentration of eskers and moraines occurs north of Lake St. Joseph. The majority of Northwestern Ontario is characterized by a weakly to moderately broken landscape. A band south of the 50th parallel contains most of the moderately broken topography with local areas of strongly broken relief near Lake Superior and Lake Nipigon. Weakly broken topography is indicative of the Fort Frances area, the area north of Dryden and the small lowland segment to the far north which forms part of the Hudson Bay-James Bay Lowlands.

Elevations in Ontario range from less than 150 feet above sea level in the lower Ottawa Valley to 1,800 feet above sea level in the Algonguin Uplands. In Northeastern Ontario, no area within the Hudson Bay-James Bay Lowlands (an area notable for its flat relief) is above 500 feet above sea level. Other flat topography in this region is associated with the Great Clay Belt. The highest elevation in Ontario (over 2,250 feet above sea level) is located on Ishputina Ridge in Corley and Ellis townships.

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*Throughout its length it forms a distinctive part of the natural environment - in the Niagara Region where it rises about 300 feet above the lake plain, in the area of the Milton outlier which is 400 feet above the plain lying to the south and east, at the Credit Forks where the brow is 1,450 feet above sea level, and at the Blue Mountain which looms above Collingwood and Georgian Bay at a height of 1,000 feet. From the air the Escarpment appears as a thickly wooded belt in a sea of farmland except for the Bruce Peninsula where the forest is more extensive (Niagara Escarpment Study Group, June 1968, p. 10).

b. Water Resources

Ontario contains a large variety and quantity of fresh water lakes and rivers, most with significant to high potential for various types of recreation/tourism activities (refer to Figure A-1).

Southern Ontario contains 32 percent of the freshwater area of the Province. The surface water includes the Great Lakes, inland lakes and numerous rivers, streams and creeks. It is unevenly distributed across the region, being concentrated by volume in the Great Lakes, but with the largest numbers as inland fresh water lakes in the Precambrian Shield.

The Great Lakes comprise 19,300 square miles in this region, representing almost 28% of its total area. The system contains approximately 1,600 miles of shoreline in a multiplicity of uses. The lakes vary considerably in their temperatures, currents, depth patterns, bottom and shoreline configurations.

Inland lakes in Southern Ontario have a total area of 2,625 square miles. Other than in the Shield, there are relatively few lakes; most notable are Lake Simcoe, the Kawarthas and the Rideau Lakes along the margin with the Precambrian Shield, and Lake Scugog and Rice Lake. Although few in number, these lakes are generally large in size and, being associated with more fertile land areas, tend to have higher nutrient levels. In addition, the Rideau-Trent-Severn waterway offers a unique combination of cultural, historic and recreational opportunities, stretching across 425 miles of the Planning Region from Ottawa to Georgian Bay. There are many thousands of miles of rivers, streams and creeks distributed throughout the Planning Region. They reflect, to a large degree, the size of the watershed and the nature of the country through which they pass. The six longest rivers in Southern Ontario, in order, are the Grand, Thames, Trent, Madawaska, Saugeen, and Mississippi.

The inland waters of Northeastern Ontario drain in two directions; the majority of the region is drained north by such rivers as the Severn, the Winisk, the Attawapiskat, the Albany, and the Moose, while the southern portion of the Region drains into the Great Lakes by such rivers as the Ottawa, the Mississagi and the Montreal.

The Northwestern Region contains a large number of lakes and rivers. There is no accurate estimate of the number of lakes in the Region, but the number is probably in excess of 150,000. Over 10% of the Region is covered

by water, and this represents nearly 30% of the freshwater area of the Province. Some of the largest lakes in Ontario, other than the Great Lakes, are located in the Region. There are more than 120 lakes over 10,000 acres. Some of the largest include Lake Nipigon, Lake of the Woods, Lac Seul, Big Trout Lake, Lake St. Joseph and Rainy Lake.

Surface water supply and, to a lesser extent, the ground water supply are subject to considerable annual and monthly variation. Water quality is also a concern. Mercury, generally from natural sources, is present in many of the water bodies in Northwestern Ontario. Among the important fishing waters affected are the Thunder Bay area of Lake Superior, Rainy Lake, Lac Seul, Lake St. Joseph and part of the English River.

i) Land/Water Interface --The importance of the lake and river shorelines lies in their ability to support a variety of recreation activities including swimming, boating (accessibility and shelter), cottaging development, shoreline fishing and scenic driving or viewing.

Particularly striking coastlines, from a scenic viewpoint, include the sand dunes along the Lake Huron shoreline, the cobble beaches along the Bruce Peninsula, the Georgian Bay shoreline, the Thousand Islands area and the Lake Superior shoreline. Many of the inland lakes, particularly the large lakes in Northwestern Ontario, have shorelines indented by numerous bays which also offer exciting viewing opportunities.

In Southern Ontario, major sand beaches are found along the Great Lakes shorelines. These include: Wasaga, Sauble, Pinery and Grand Bend on Lake Huron; Holiday Beach and Crystal Beach along the Lake Erie shoreline; and Sand Banks and Presqu'ile on Lake Ontario. Numerous smaller beaches are found on shores of numerous inland lakes on the Precambrian Shield. In addition, among the marshes offering opportunity for wildlife viewing are Minising Swamp, Luther Marsh, Second Marsh, the Lake St. Clair Marshes, those at Point Pelee, Rondeau, Long Point, Prince Edward County, Lake St. Lawrence, Lake Scugog and Lake Simcoe.

The shorelines of the multitude of lakes in Northern Ontario also provide numerous sand beaches of varying sizes. Along the Great Lakes shore, however, even the larger sand beaches are smaller in size than in Southern Ontario (e.g., south shoreline of Manitoulin Island, St. Joseph Island and Goulais Bay). Marsh areas are situated on the shorelines of many lakes in Northern Ontario; however, the marshes along the Hudson Bay and James Bay coast are by far the most noteworthy because of their size and importance as breeding grounds for geese.

ii) Sports Fisheries--A recreation resource, directly associated with water resources in Ontario, is sports fisheries. There are a large variety of sports fish found in Ontario; yellow pickerel (walleye), largemouth and smallmouth bass, maskinonge, brook, brown, rainbow and lake trout, splake and whitefish. Although there is considerable fishing pressure in Southern Ontario, casual angling will continue to be an important component of most outdoor-activity pleasure trips in the area. Northern Ontario receives less fishing pressure, although some areas (primarily those with road access) have been declared 'sensitive' to angling.

In Southern Ontario the great abundance of reasonably clean water provides an extremely high potential for fish production, particularly in the more fertile waters off the Precambrian Shield. For a discussion of present fish fauna, it is convenient to consider five areas within Southern Ontario: the Great Lakes, Southwestern Ontario, Lake Simcoe including the Kawarthas and the Rideau Lakes, Eastern Ontario and the Precambrian Shield.

In the Great Lakes, pickerel, pike (Lake Huron), bass, perch, rainbow trout, splake (Lake Huron), maskinonge (Lake St. Clair), and salmon (Lake Ontario) are the principle sports fish. In Southwestern Ontario most streams contain trout (brook, brown and rainbow) in their headwaters. Most larger rivers and warmer small streams provide valuable pickerel, bass and pike habitat. In Lake Simcoe and in the Kawartha and Rideau Lakes, the building of the canal system and subsequent enlargement of the Kawartha-Rideau Lake system has improved fishing for bass, maskinonge and pike (Rideau Lakes). Lake Simcoe still possesses important lake whitefish and lake herring populations. In the waters of the Ottawa-St. Lawrence Lowlands, streams and rivers provide habitat for pike, bass and yellow pickerel. However, fish populations have been seriously reduced due to man-initiated pressures (e.g., stress from shoreline development, excessive fishing).

The areas of fewest constraints are concentrated in the southeastern portion of Southern Ontario and include such areas as Prince Edward and Hastings counties, the lower section of the Rideau system north of Kingston and Rice Lake. Other areas of high capability include the Credit River watershed, Harvey and Cavendish townships in Haliburton, Orillia township, and an area immediately west of Ottawa.

The capabilities to produce fish per unit of water surface in Northeastern Ontario are among the lowest in Ontario. The southern half of this

region, due to the characteristics of the geological and soil strata through which the watersheds flow, is less productive per surface acre than the northern portion. One-third of Ontario's supply of lake trout waters exist within Northeastern Ontario These aquatic systems are generally recognized as the least fertile and most fragile systems to maintain.

The sensitive fishing areas of Northwestern Ontario are the lake trout lakes and the rainbow trout streams of Lake Superior. Atikokan District has the largest number of lake trout lakes (135), followed by Kenora and Thunder Bay with 99 and 76, respectively. The known number of lake trout lakes in the region is approximately 650, but it is estimated that there are 150 more which have not been positively identified. This total of 800 lakes represents 28% of the estimated Provincial total, which in turn is an important proportion of the world supply of lake trout waters. The critical waters for yellow pickerel, the most important sports species in the Region, are Lake of the Woods, Rainy Lake, Whitefish Lake, Lac Seul and Lac des Mille Lacs.

c. Wildlife

The broad range of habitat in Ontario supports a wide variety of species, many of which are valuable for recreational purposes such as hunting or viewing. The agricultural area includes the most biologically productive wetlands in the Province. These wetlands are strongholds for wildlife production in areas where clearing, urbanization and intensive farming practices have reduced the diversity of habitat and consequently of wildlife species in the immediate locality.

Areas with high capability for waterfowl production are shown on Figure A-3, as the existing marshes ranked Class 1, 2 or 3 by the Ontario Land Inventory. All of these marsh areas are off the Precambrian Shield, with many of them being situated along the Great Lakes shorelines.

Another important feature is the major concentrations of ducks, geese, shorebirds, hawks and songbirds which migrate through areas along the Lake Erie and Lake Ontario shorelines. Important staging areas in this part of the Atlantic Flyway are Presqu'ile, the bays of Prince Edward County, Long Point, Rondeau, Point Pelee and Lake St. Clair.

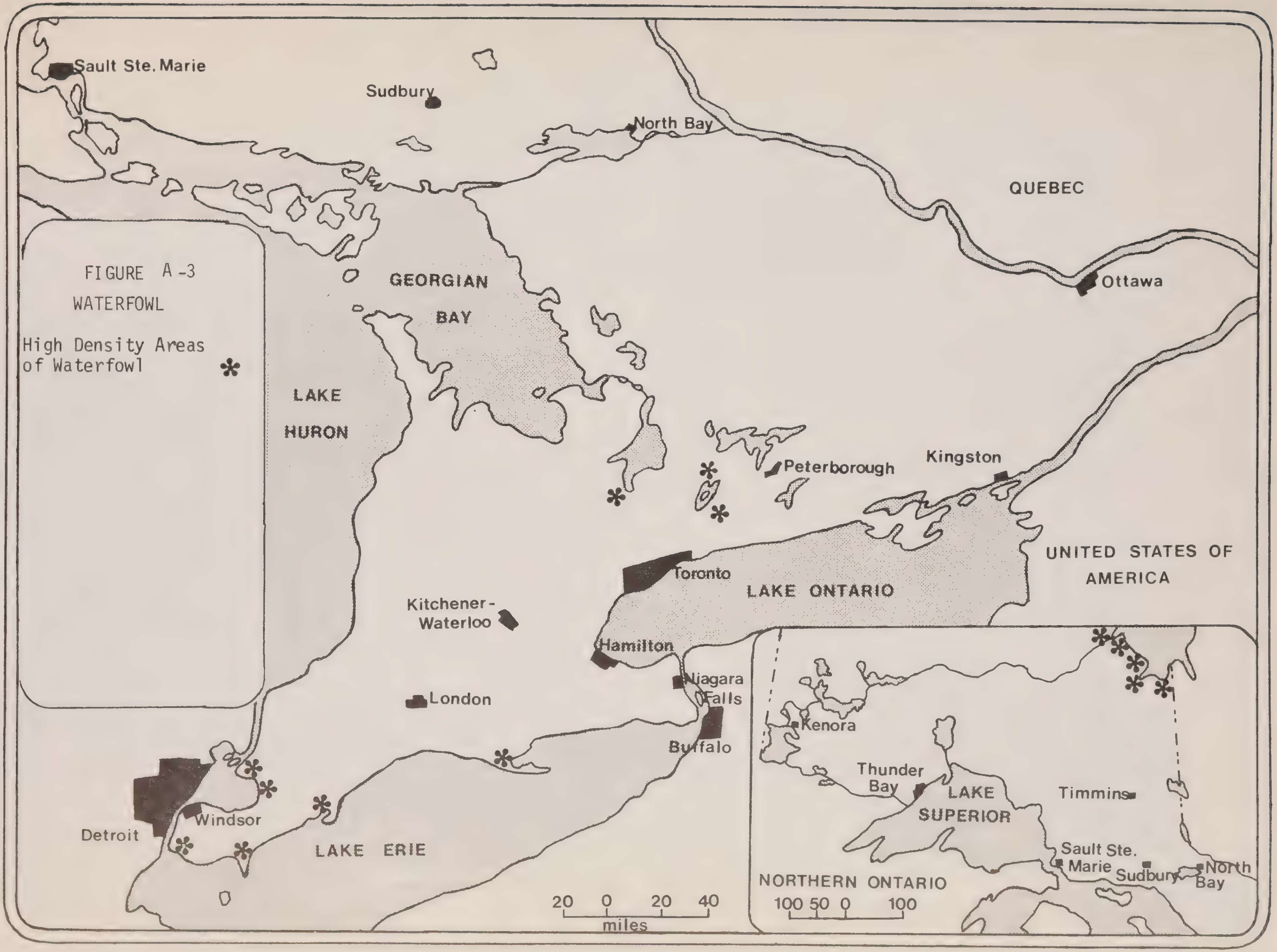

FIGURE A-3
WATERFOWL

High Density Areas of Waterfowl *

Southern Ontario supports an impressive mixture of woodland, farmland and wetland wildlife. The habitat variety is noticeably different between the largely forested Precambrian Shield and the rich agricultural area to the south, which has a varying pattern of farmland interspersed with lesser forest and wetland areas. In no other part of Ontario is this kind of diversity and level of productivity available to wildlife. The Precambrian Shield supports species such as moose, beaver, otter, mink, black bear and goshawk. The agricultural area, because of its warmer climate and dominance of farmland habitat, supports a wider variety of species including coloured fox and eastern cottontail. Its combination of farmland and woodland support white-tailed deer, raccoon, wood ducks, cottontail rabbits, gray and red squirrels, and many species of songbirds and hawks.

Fur bearers, including beaver, otter, muskrat, mink and fisher are prevalent throughout Northwestern Ontario Black bear and moose are also common, while deer and caribou occur in more restricted locations.

The distribution of moose is shown on Figure A-4. The areas of highest density (greater than .8 moose per square mile) are: the area between Thunder Bay and English River north of Highway 17 and the C.N.R. mainline, a broad band from Minaki northeasterly to Lake St. Joseph, a large pocket centred on the Manitou lakes, and a small pocket south of Sioux Lookout. The remainder of the area south of the 51st parallel maintains medium density. North of the 51st parallel the density is low and gradually diminishes toward the tree line in the north.

Although no comprehensive surveys for wildlife capability have been completed in Northwestern Ontario, it may be inferred that capacity is generally moderate as compared with the more productive parts of Ontario. The highest capability areas for moose production are the Fort Frances-Kenora-Dryden-Red Lake area and the Thunder Bay-Marathon-Manitouwadge area. The remainder of the region south of the 52nd parallel is rated moderate, while north of that line it is low.

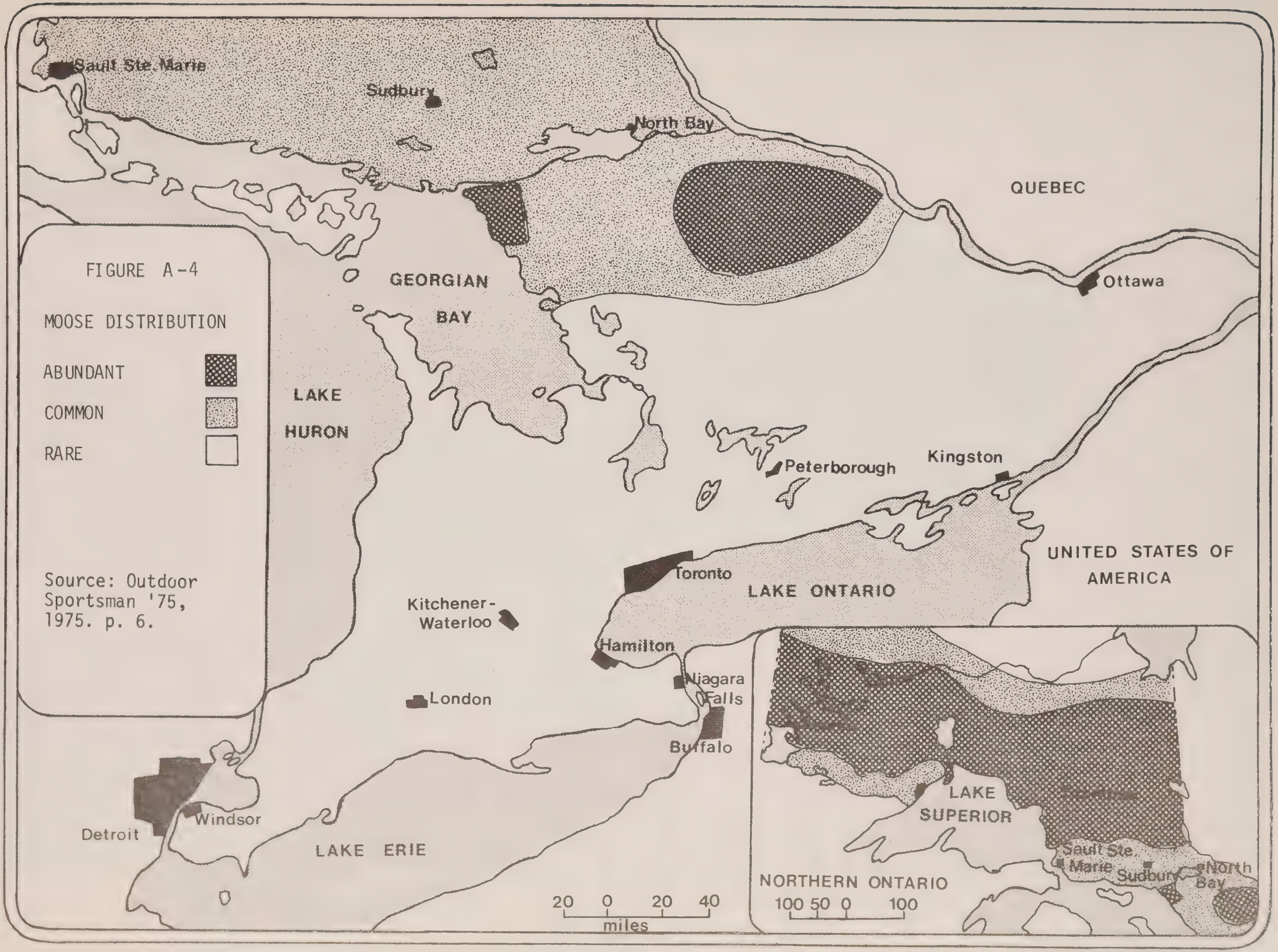
FIGURE A-4
MOOSE DISTRIBUTION
ABUNDANT
COMMON
RARE
Source: Outdoor Sportsman '75, 1975. p. 6.
Sault Ste. Marie
Sudbury
North Bay
QUEBEC
Ottawa
GEORGIAN
BAY
LAKE
HURON
Peterborough
Kingston
UNITED STATES OF
AMERICA
Toronto
LAKE ONTARIO
Kitchener-
Waterloo
Hamilton
Niagara
Falls
London
Buffalo
Detroit
Windsor
LAKE ERIE
20 0 20 40
miles
LAKE
SUPERIOR
Sault Ste.
Marie
Sudbury
North
Bay
NORTHERN ONTARIO
100 50 0 100

The distribution of deer is also illustrated on Figure A-5. The highest density (greater than 15 deer per square mile) is in the farming area west of Fort Frances. Medium densities (5 to 15 deer per square mile) occur around Dryden, Kenora, Flanders, and Thunder Bay. In the remainder of the region deer are almost non-existent.

The main concentration of caribou is in the northern part of the region in the Hudson Bay Lowlands. Small scattered herds occur in such places as the Irregular Lake area, north and east of Lake Nipigon, the Pukaskwa area, and a small population on the Slate Islands.

In Northeastern Ontario land capability or carrying capacity of the range for most species (moose, deer, and black bear) generally decreases in a northerly direction. Deer range approaches to its northern limits along the Highway 17 corridor. The capability for the production of small game is moderate to high due to the varied species and types of habitat available. The capability for waterfowl is limited to localized wetlands, with the exception of the coastal area of Hudson and James Bay, which is internationally significant as a staging area for blue and snow gees.

d. Climate*

Weather influences or controls almost every outdoor recreation/ tourism activity and the degree of participant satisfaction that can be obtained. All components of climate, including sunshine, precipitation, wind, and temperature offer some degree of direct significance on out-of-door activity, and consequently influence indoor pursuits. Therefore, one must seriously consider the impact of climate when planning for tourism and recreation.

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*Much of the discussion of the climate of Ontario was adapted from Ministry of Natural Resources publications (September and December 1974 and 1975) and Gunn, et al (October 1975).

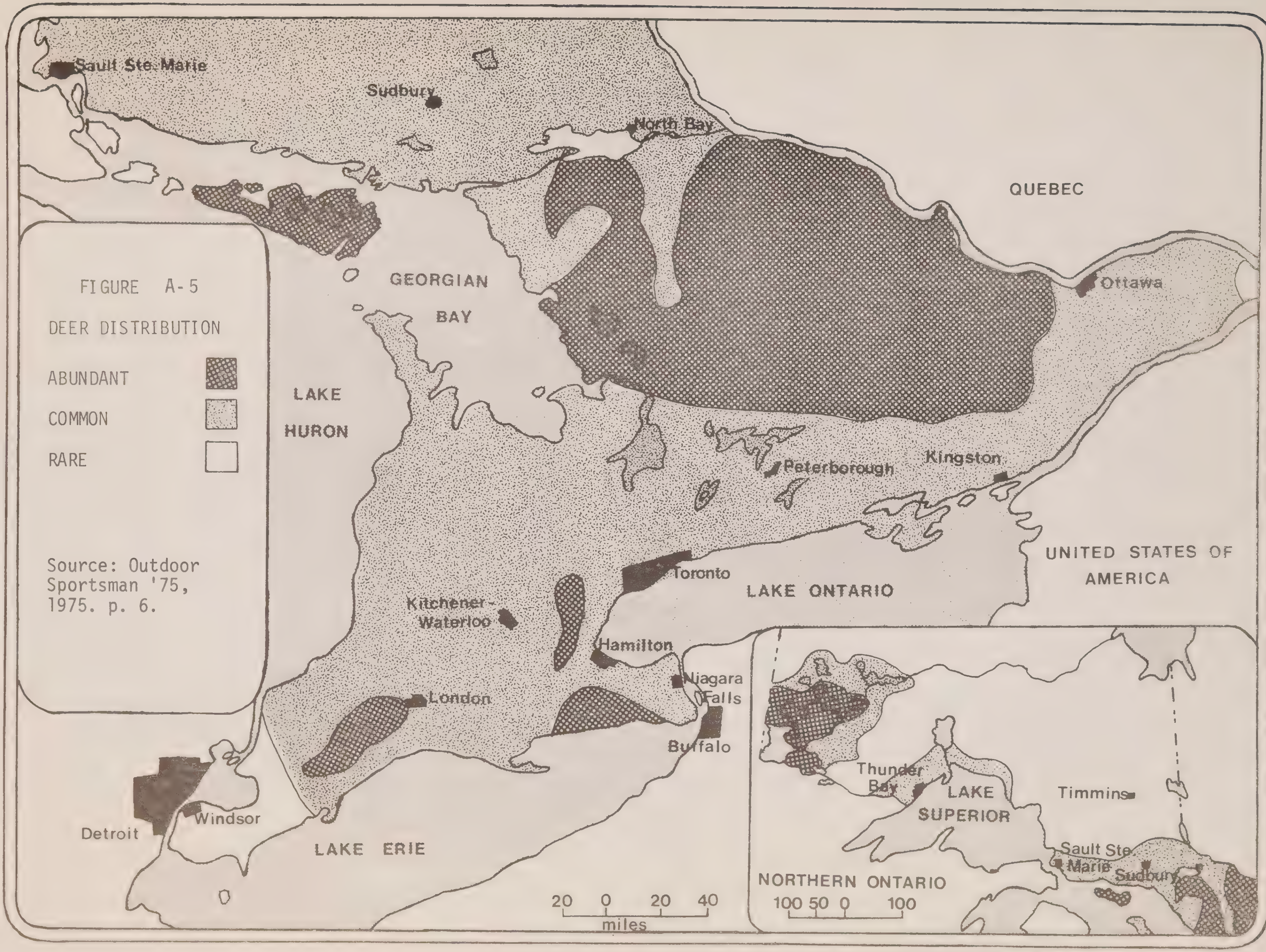


FIGURE A-5

DEER DISTRIBUTION

Source: Outdoor Sportsman '75, 1975. p. 6.

In relation to summer and winter seasons, the critical (most influential) climatic factors in the Ontario setting can be summarized as follows: (a) summer--air temperature, humidity, precipitation, cloud cover, visibility, wind speed, water temperature, and (b) winter--the duration of daylight, air temperature-directly and in combination with wind speed, precipitation, cloud cover, visibility, the presence of quality snow and/or ice cover.

Figure A-6 describes the tourism recreation seasons, and Figure A-7 the schematic representation of recreation seasonal patterns at a typical Ontario locality.

The climate of Southern Ontario is strongly influenced by a combination of the range in latitude, altitude, and topography; the proximity to the Great Lakes; and its position in the continental land mass. It has a most favourable cool temperate, sub-humid climate.

The Great Lakes are excellent sources of atmospheric moisture and also add (or take) vast amounts of heat to (from) the air that crosses them. Thus, areas to the lee of the lakes experience significantly more cloud, precipitation and more moderate temperatures than elsewhere. Due to Great Lake influences, winter temperatures are 5 to 10 degrees Fahrenheit higher in Southwestern Ontario than areas of comparable latitudes and altitudes in the midwestern United States and 5 to 10 degrees cooler in summer.

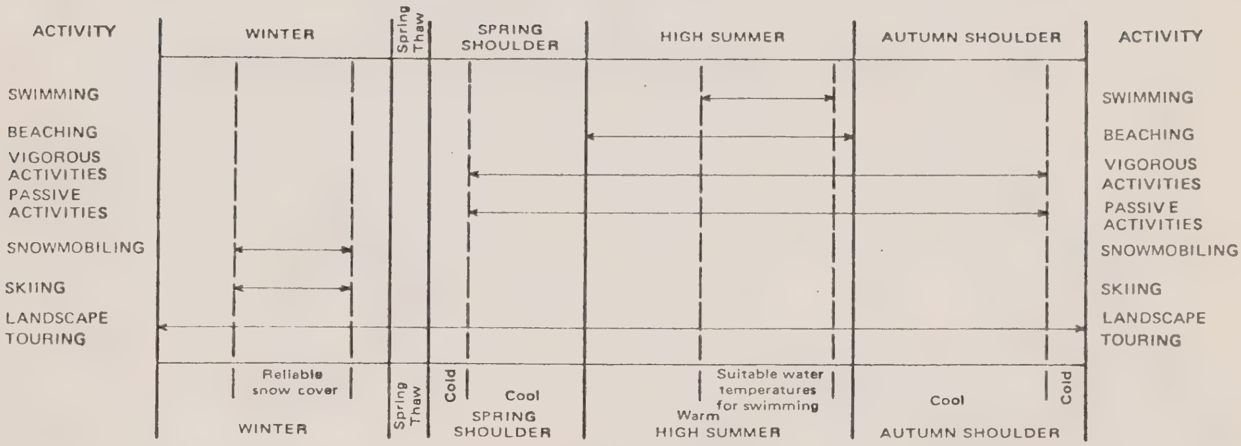
The prevailing winds are westerly (predominately southwesterly) over 50 percent of the year. These winds cross Lake Huron before they get to Southern Ontario and, therefore, influence the climate. One apparent effect is the heavy snowfall immediately in lee of this lake, as shown in Figure A-8. Lake Ontario and Lake Erie have marked influences upon the climate of the Niagara area.

There is a relatively large range of temperatures over Southern Ontario. Mean daily temperature ranges, both in January and July, are less in areas bordering the Lakes than further inland. The more moderate temperatures, both in winter and summer, occur in the areas adjacent to the Great Lakes.

Temperatures are generally warmest toward the extreme southwest, and coolest in the uplands of the Precambrian Shield. January mean daily temperatures vary from 26 degrees Fahrenheit at Windsor and in the Niagara

FIGURE A-6

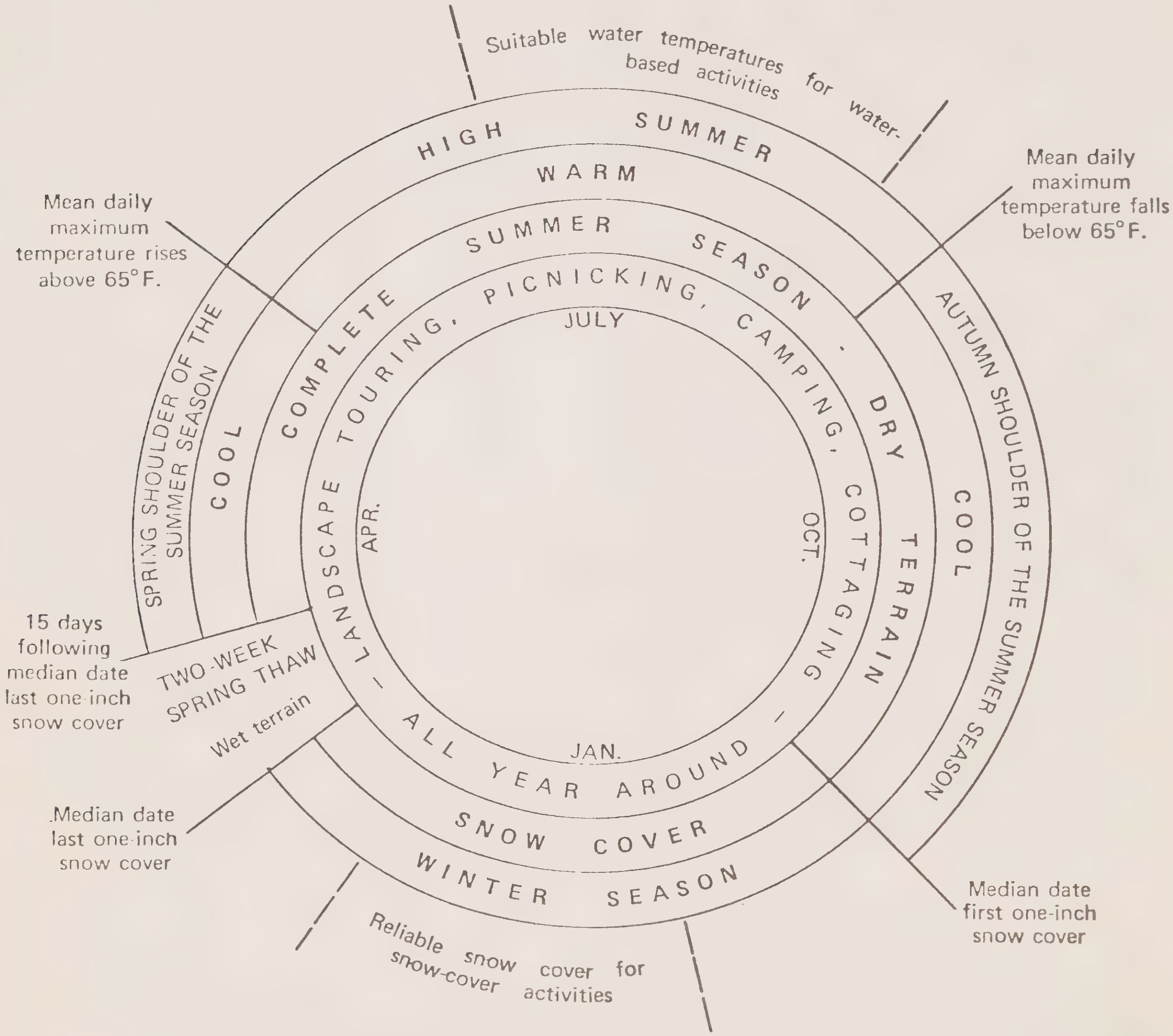
TOURISM AND RECREATION SEASONS



Source: Atmospheric Environment Service, <u>The Tourist and Outdoor Recreation Climate of Ontario</u>, Department of the Environment, Toronto, 1973.

FIGURE A -7

SCHEMATIC REPRESENTATION OF RECREATION
SEASONAL PATTERNS AT ANY TYPICAL ONTARIO LOCALITY



Source: Atmospheric Environment Service, The Tourist and Outdoor Recreation Climate of Ontario, Department of the Environment, Toronto, 1973.

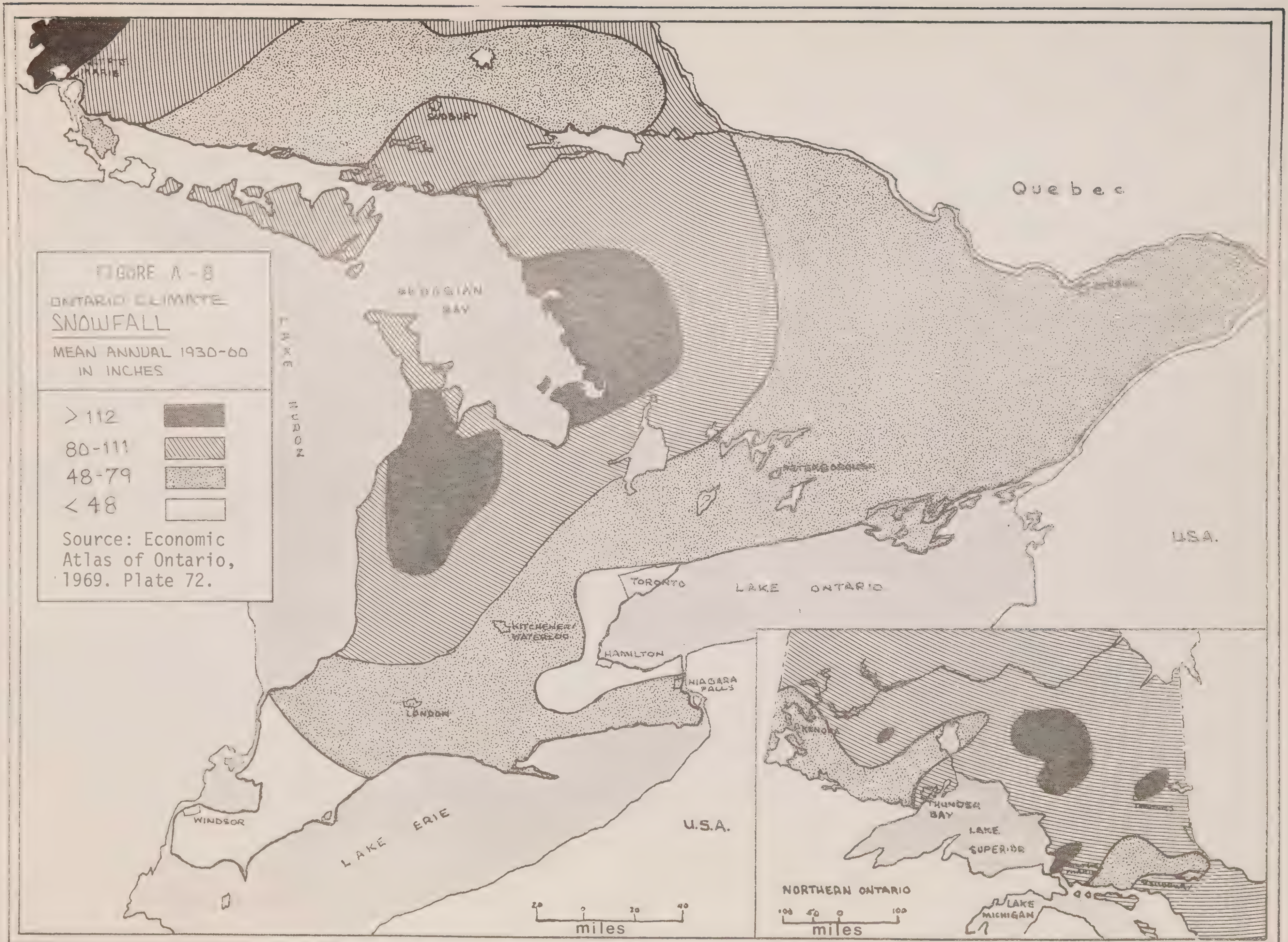


FIGURE A - 8
ONTARIO CLIMATE
SNOWFALL
MEAN ANNUAL 1930-60
IN INCHES
> 112
80-111
48-79
< 48
Source: Economic Atlas of Ontario, 1969. Plate 72.
Quebec
GEORGIAN BAY
LAKE HURON
SUDBURY
PETERBOROUGH
U.S.A.
TORONTO
LAKE ONTARIO
KITCHENER/WATERLOO
HAMILTON
NIAGARA FALLS
LONDON
WINDSOR
LAKE ERIE
U.S.A.
20 0 20 40
miles
KENORA
THUNDER BAY
LAKE SUPERIOR
LAKE MICHIGAN
NORTHERN ONTARIO
100 50 0 100
miles

fruit belt, to 10 degrees Fahrenheit in the Algonguin area. Daily maximums in July vary from 72 degrees Fahrenheit at Windsor to 66 degrees Fahrenheit and 64 degrees Fahrenheit in the Algonquin and Dundalk uplands (refer to Figure A-9).

The precipitation in the area is fairly uniformly distributed throughout the year, averaging about 2 to 4 inches per month. Annual precipitation rates vary from 20 to over 40 inches. They tend to be low in the southwest, in the Niagara Peninsula and in the middle Ottawa valley. Higher values occur on the highest parts of the area behind the Niagara Escarpment and on the west side of the Algonquin uplands. Annual precipitation is heaviest in lee of Lake Huron where it exceeds 40 inches. Mean annual snowfall maximums occur in the Owen Sound-Goderich and the Gravenhurst areas with 90 to 120 inches, while the Windsor-Chatham area and the Niagara Peninsula receive the least with 32 to 50 inches recorded (refer to Figure A-8).

Typical water temperatures at mid-summer range from 76 degrees Fahrenheit in the Lake St. Clair area to less than 69 degrees Fahrenheit in the lakes of Algonquin Park, most of Georgian Bay, Lake Ontario and the Dundalk Uplands (Figure A-10). Typical mid-summer water temperatures at major beaches, including Wasaga, Grand Bend, those along the Lake Erie shoreline and along the St. Lawrence River are over 70 degrees Fahrenheit.

Northeastern Ontario is classified as having a modified continental climate. The continental air masses are modified by Hudson Bay in the north, and by the Great Lakes to the west and south. The moderating influence of large water bodies such as Lake Huron, Lake Superior and to a lesser degree, Lake Nipissing, Lake Timiskaming and Lake Abitibi, is manifested in shorter and less severe winters for those areas within 40 to 50 miles of the shoreline. The effect of Hudson and James Bay is a moderation of summer temperatures and the occurance of frequent fog and precipitation along the coastal area. Mean daily January temperatures range from a low of -12 degrees Fahrenheit on the Hudson Bay coast in the north to +12 degrees Fahrenheit on the north shore of Lake Huron. The mean daily temperature for July ranges from 68 degrees Fahrenheit around North Bay in the south, to 55 degrees Fahrenheit on the Hudson Bay coast. Mean annual total precipitation varies from 16 inches in the extreme northwest on the Hudson Bay Lowlands to 32 inches

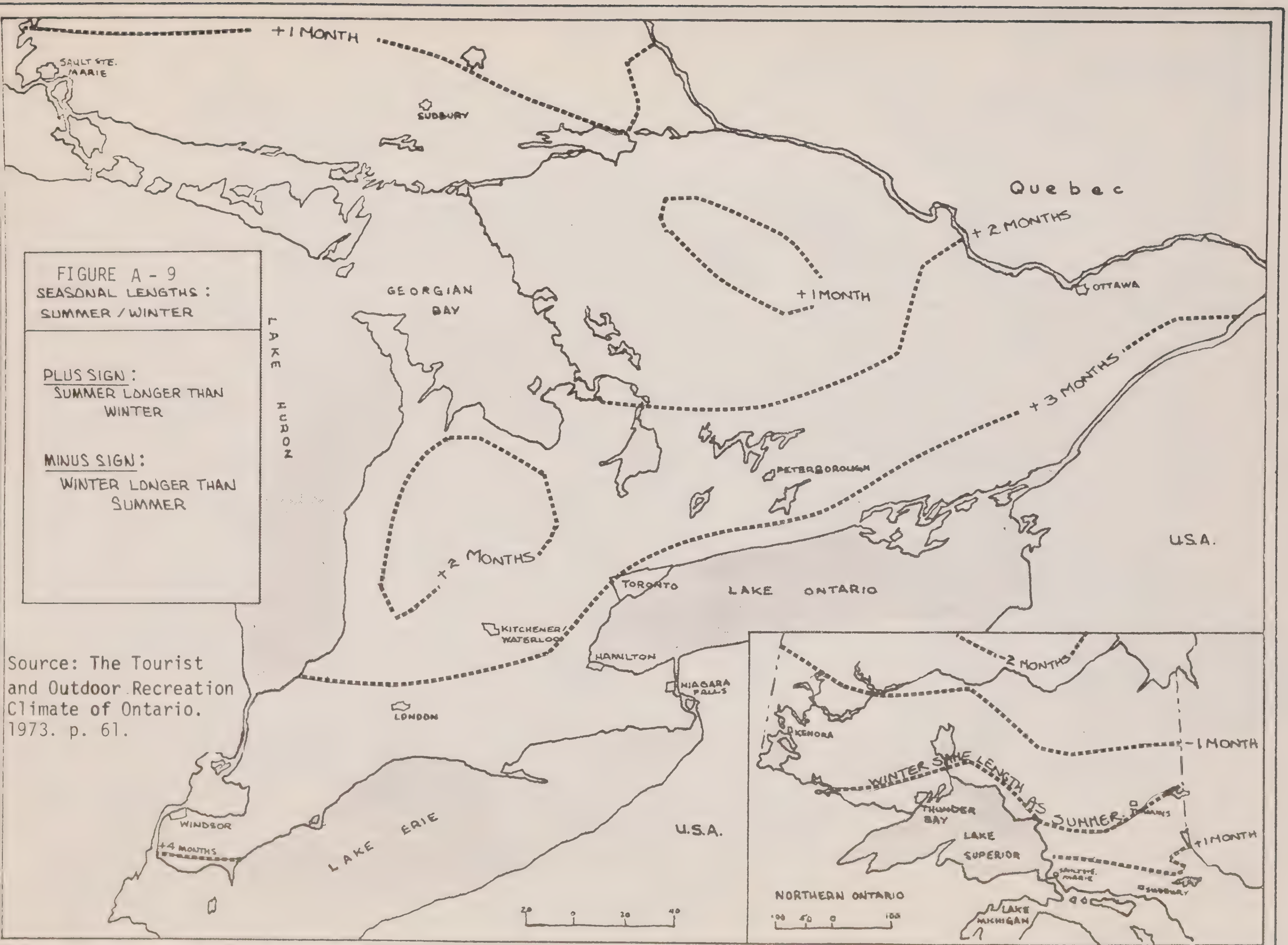
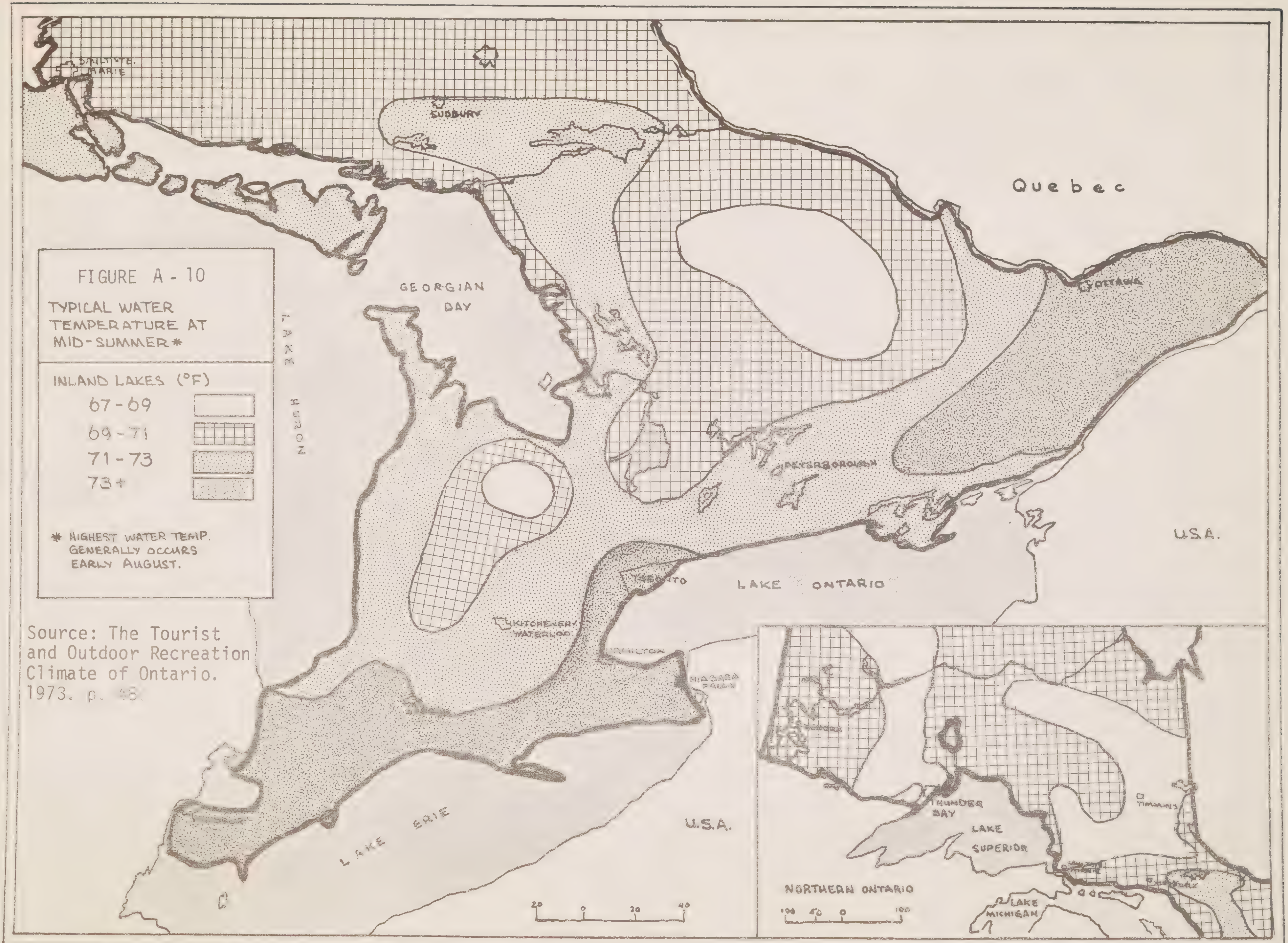


FIGURE A - 9
SEASONAL LENGTHS :
SUMMER / WINTER

PLUS SIGN :
SUMMER LONGER THAN WINTER

MINUS SIGN :
WINTER LONGER THAN SUMMER

Source: The Tourist and Outdoor Recreation Climate of Ontario. 1973. p. 61.



Source: The Tourist and Outdoor Recreation Climate of Ontario. 1973. p. 48.

on the north shore of Lake Huron. Table A-1 displays the climatic characteristic of selected location within the Northeastern Planning Region.

The Northwestern Ontario Region has a modified continental climate. Temperature extremes are moderated by the effect of both Hudson Bay and Lake Superior. Mean daily maximum temperatures in January range from 18 degrees Fahrenheit near Lake Superior to 9 degrees Fahrenheit in the northernmost part of the Region. Daily maximums in July vary from 78 degrees Fahrenheit in Rainy River District to 69 degrees Fahrenheit in the Hudson Bay Lowland. Annual precipitation varies from 34 inches near Lake Superior to 24 inches in Rainy River and Thunder Bay to 110 inches along the north shore of Lake Superior east of Nipigon.

TABLE A-1

CLIMATIC CHARACTERISTICS OF THE NORTHEASTERN PLANNING REGION

LOCATION	ANNUAL PRECIPITATION (IN INCHES)	SNOWFALL (IN INCHES)	MEAN TEMPERATURE JAN-JULY (DEGREES FAHRENHEIT)	
Manitoulin Island	32	20	17	67
North Bay	36	20.5	13	66
Sudbury	33	18	12	66
Haileybury	31	16	10	64
Chapleau	30	16	2	62
Kapuskasing	33	16	0	63
Moosonee	29	12	- 5	59

i) Implications for Tourism--Throughout Ontario the climate allows for a wide variety of summer and winter outdoor recreation activities. In some cases, variations in temperature, amount of precipitation and prevailing winds permit activities such as winter skiing, swimming and camping by complementing the physical resource base by providing snow for the slopes, warm water in the lakes and rivers and suitable ground and vegetation cover on the variety of surface features that exist in Ontario. Although participation in most activities is possible throughout the Province, some are more suited to southern or northern Ontario, depending largely on the climatic influences.

Climate influences summer activities in the following ways. The season for summer activities is longest in southwestern Ontario, exceeding winter by as much as 2-4 months. Within the Great Lakes, swimming is most comfortable along the eastern shoreline of Lake Huron, in Georgian Bay and along the Lake Erie shoreline. The summer water temperatures

along the Lake Superior shoreline do not reach the 65 degree Fahrenheit temperature which is considered necessary for swimming comfort. On the inland lakes swimming is comfortable south of the line drawn from Moosonee westward to Trout Lake. However, the best potential for swimming in terms of seasonal length and water temperature exists in Southern Ontario and on Lake Nipissing, in the Manitoulin Island lakes and the Lake of the Woods area in Northern Ontario. The potential for other summer activities that are more dependent upon the actual length of the complete summer season (e.g., boating, camping) is best in Southern Ontario and also good throughout the more populated parts of Northern Ontario.

Potential for winter activities is influenced by the following combination of climatic characteristics:

a. relatively high and reliable snowfall,

b. comparatively warm winter temperatures (winter temperatures in the far north would severely restrict outdoor recreation), and

c. a reasonably long winter season.

An examination of these climatic considerations indicates that the Bruce Peninsula, the Georgian Bay area, Manitoulin Island, the Sault Ste. Marie, Sudbury, North Bay, Timmins and Thunder Bay vicinities and the Lake Superior shoreline have the greatest potential for winter outdoor recreation.

e. Capability for Outdoor Recreation Use

The natural features that have been described in this section, when analyzed as they interrelate, describe the potential of all parts of Ontario to support recreation/tourism activities. The Ministry of Natural Resources has evaluated the Ontario landscape based on these natural features and has produced a system of classification through the Canada Land Inventory to describe capability for intensive and extensive use.

i) Intensive Recreation Capability--Intensive use involves more permanent impact on the landscape and includes beach-oriented activities (swimming, boating), concentrated cottaging, camping, lodging, year-round fishing, downhill skiing and viewing of key/unique landscapes and physical features. According to the Canada Land Inventory, areas ranked in the first three classes are recognized as the most important for providing intensive recreation opportunities.

Figure A-11 shows the areas within Ontario that have outstanding and high concentrations of Class 1, 2 and 3 rated recreation land.

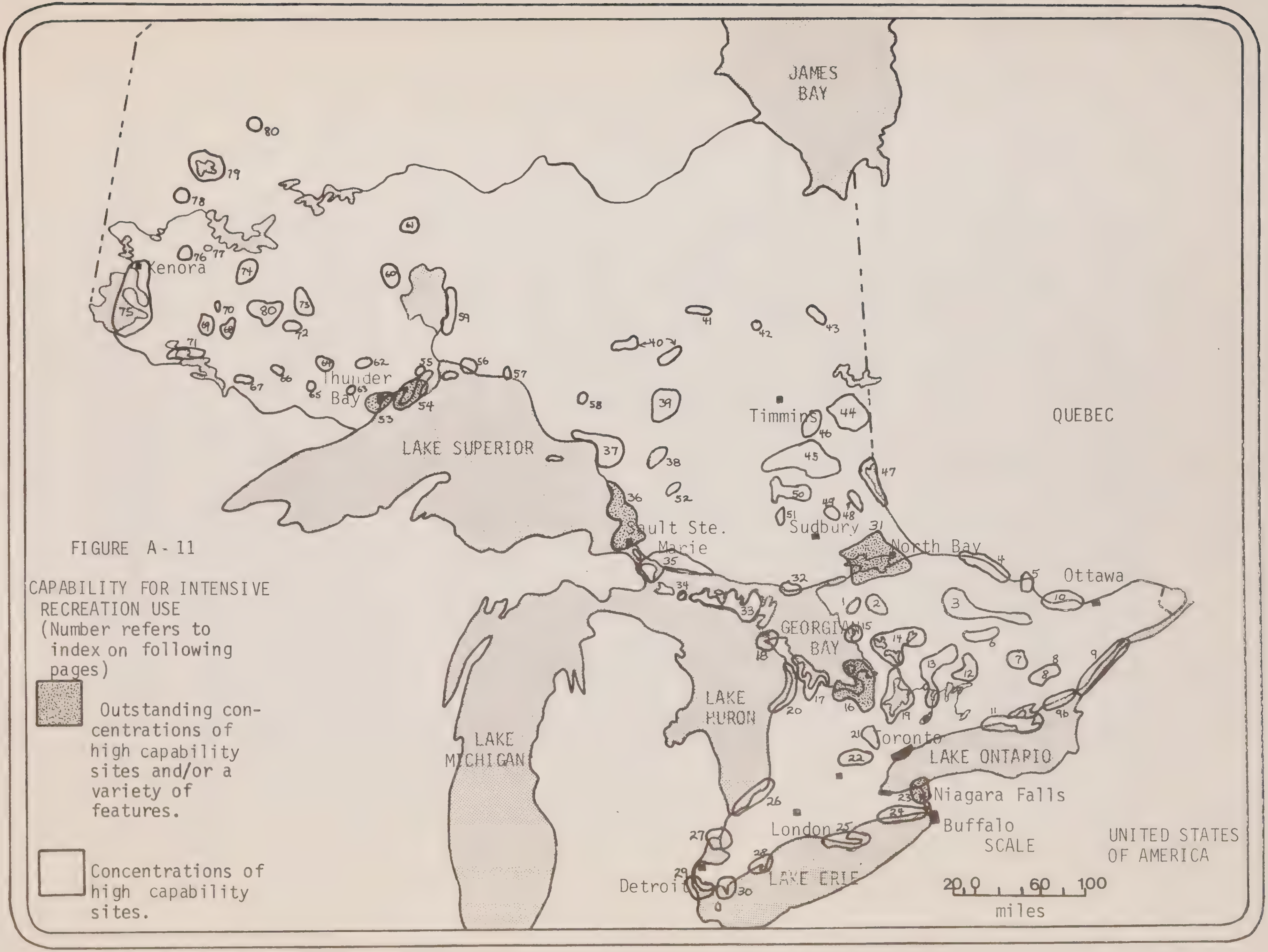


FIGURE A-11

CAPABILITY FOR INTENSIVE RECREATION USE
(Number refers to index on following pages)

Outstanding concentrations of high capability sites and/or a variety of features.

Concentrations of high capability sites.

LEGEND FOR FIGURE A-11

(CAPABILITY FOR INTENSIVE RECREATION USE)

Southern Ontario

1. Whitestone Lake, Maple Island area - excellent for swimming, camping, cottaging.

2. Sollman, Bernard, McCann, Sand, Three Mile, Doe Lakes - swimming, camping, cottaging.

3. Petawawa River and Lakes of Algonquin Provincial Park (Round, Golden, Clear Lakes) - swimming, camping, cottaging.

4. Holden Lake - swimming, camping, cottaging.

5. Lower Allumette and Lake Coulonge - swimming, camping, cottaging.

6. Bark Lake, Kamaniskeg (Barry's Bay) - swimming, camping, cottaging.

7. Bon Echo Provincial Park, Skobtamalta, Mazinaw, Marble and Mississagagon Lakes - swimming, camping, cottaging, caves.

8. Rideau Lakes - swimming, camping, cottaging, boating, angling.

9. St. Lawrence River Shoreline - extensive sand beaches, excellent swimming, camping, cottaging, boating.

9B. Thousand Islands - swimming, camping, cottaging, boating, historic site (Fort Henry).

10. Lac Des Chats, Lac Deschene - swimming, camping, cottaging.

11. Prince Edward County Complex - parks, beaches, historic sites, boating.

12. Kawartha Lakes - swimming, camping, cottaging, boating, angling.

13. Haliburton Highlands, Balsam Lake, Sturgeon Lake, Fenelon Falls - swimming, camping, cottaging, angling, boating (skiing).

14. Muskoka Lakes (including Lake St. Joseph, Lake Three Mile, Lake Muskoka, Lake of Bays, Vernon Lake, Fairy Lake) - swimming, camping, cottaging, boating.

15. Parry Sound, Five Mile Bay - camping, cottaging, boating, angling.

16. Wasaga Beach, Collingwood, Huronia - (winter and summer opportunities) sand beach, swimming, skiing (cross-country and downhill), walking, viewing, caves, historic site (St. Marie), Wye Marsh, boating.

Legend for Figure A-11, continued

17. East coast of the Bruce Peninsula (Owen Sound to Lion's Head) - swimming, cottaging, viewing, Niagara Escarpment, cobble beaches, boating (Owen Sound, Wiarton), islands.

18. Tip of Bruce Peninsula - rock formations, boating, underwater exploration, Flower Pot Island, National Park (caves).

19. Lake Simcoe - cottaging, swimming, angling, boating.

20. Sauble Beach - sand beach, swimming, cottaging, boating (fishing Sauble River).

21. Heart Lake, Caledon - viewing, skiing, angling.

22. Elora Gorge, Rockwood - rock formations, viewing.

23. Niagara Falls - falls, historic sites.

24. Crystal Beach - swimming (sand beach).

25. Long Point - swimming, sand beach, angling, wildlife (bird), viewing (marshes).

26. Grand Bend (Pinery Park) - extensive sand dunes, swimming, camping.

27. Marshes of Lake St. Clair - wildlife viewing, hunting, excellent fishing.

28. Rondeau Park area - swimming, wildlife viewing.

29. Mouth of Detroit River - sand beaches.

30. Point Pelee, Pelee Island, Holiday Beach - swimming, wildlife viewing.

Northeastern Ontario

31. Lake Nipissing and Surrounding area - This is an area having high capability for a variety of recreational activities. Most notable are the extensive bathing beaches of Lake Nipissing. High quality beaches are also found on other lakes in the area (e.g., Nosbonsing, Tomiko and Trout Lakes). Lodging and camping sites, boating opportunities, excellent fishing, ski hills, waterfalls and viewpoints are further attractions of the area.

32. Killarney, Baie Fine Area - deep water harbours, excellent viewing, topographic variety, beaches and good lodging sites are the notable features of this area.

33. Manitoulin Island - the Island has no unique recreational features but does offer many good bathing beaches, camping and lodging opportunities and access to good boating waters.

Legend for Figure A-11, continued

34. Cockburn Island - Good opportunities for bathing, lodging, camping and boating exist along the shore of the Island.

35. Blind River, St. Joseph Island Area - Several of the inland lakes and St. Joseph Island have very good bathing beaches. These shores are also well suited to camping and lodging. The North Channel shoreline is not notable for intensive recreation in this area but does have some good bathing beaches and stretches of shoreline suited to camping and cottaging.

36. Batchewana, Goulais Bays and Agawa Canyon area - the Lake Superior shoreline in this area has extensive sandy beaches. Although cold water is a limitation to bathing at times, viewing and camping opportunities are very good. Deep water harbours, spectacular views and waterfalls and excellent Indian pictographs at Agawa Bay are also found along the shoreline. Inland, the rugged terrain offers possibilities for ski hills and viewing. It is this combination of high quality and variety of recreation opportunity that makes this area notable.

37. Michipicoten - the shoreline of Lake Superior in this area offers good beaches for bathing and camping, lodging sites and deep water harbours. Inland the topography is varied. Opportunities for viewing waterfalls, and potential ski hills are scattered throughout the area.

38. Dog Lake, Manitowik Lake - the most notable features of this unit are the fine bathing beaches and cottaging and camping possibilities of Dog Lake. Although of lower capability for intensive use, Manitowik and Whitefish Lake are attractive and offer many opportunities for bathing, camping, cottaging and boating.

39. Kabinakagami and Cameron Lakes - good sand beaches are found along the shoreline of Cameron Lake. Kabinakagami is a large lake with no extensive areas of high capability. However, good beaches and camping and cottaging sites are scattered throughout the lake.

40. Nagagami Lake, Nagagamisis Lake - the major features of Nagagami and Nagagamisis lakes is good sand bathing beaches. The shorelines along some stretches are well suited to camping and lodging. North of Nagagamisis Lake is an interesting area of moraine having topographic variety and the emerald green water of Big Skunk and Redpine Lakes.

41. Fushimi and Pivabiska Lakes - good quality bathing beaches, opportunities for camping, cottaging and angling are the features of these lakes.

42. Remi Lake - the shoreline of Remi Lake is suitable for intensive use for bathing, cottaging and camping.

43. Pierre and Little Abitibi Lakes - good bathing beaches, backshore areas suited for camping and cottaging, boating and angling oppor-

tunities combine to make these lakes suitable for intensive recreation use.

44. Kirkland Lake and Larder Lake area - the recreational attractions of this area are good bathing beaches, camping and cottaging sites and terrain offering good potential for viewing and skiing.

45. Gowganda - in the northern part of this area there are several sites with good potential for viewing and skiing. Beaches and backshores suited to bathing and camping offer opportunities for intensive recreation use on the lakes around Gowganda and Shining Tree.

46. Watabeag Lake, Radisson Lake Area - in this area there are several small lakes having capability for intensive use for bathing, cottaging and camping.

47. Lake Temiskaming - the northern part of this lake has shoreline areas well suited to bathing, camping and cottaging.

48. Timagami - although much of Lake Timagami is better suited to extensive use, there are stretches of high quality sand beach, and areas suited to intensive use for camping and cottaging.

49. Wanapitei - the major attraction of this lake is an extensive stretch of high quality bathing beach along the north shore.

50. Onaping Lake area - sand bathing beaches, good small boating waters. shoreland suited for cottaging and camping combine to make this area of lakes suitable for intensive recreation use.

51. Windy, Fairbank and Vermillion Lakes - bathing beaches and backshores suitable for cottaging and camping are the significant features of this area.

52. Como Lake and Racine Lake - both lakes have excellent sand bathing beaches and areas suitable for intensive use for camping and lodging.

Northwestern Ontario

53. A variety of features occur in this area, ski hills, excellent viewing over Thunder Bay and the city, rock formations and beaches.

54. A variety of features occur along the Sibley Peninsula: excellent viewing, impressive rock formations, the site of one of the world's richest silver mines, beaches, harbours and lodging sites.

55. The impressive rock formations of Ouimet Canyon, waterfalls and beaches.

56. Bathing beaches, lodging and camping sites, waterfalls, Mountain Bay, Gravel River, Cypress Bay.

Legend for Figure A-11, continued

57. Bathing beaches, lodging and camping sites, waterfall topographic variety, canoe route - Santay Lake.

58. White Lake and Duncan Lake - bathing beaches, camping and lodging sites, topographic variety, boating.

59. The eastern shoreline of Lake Nipigon - beaches, lodging sites, rock formations, topographic variation, viewing.

60. Bathing beaches, camping and lodging sites, waterfalls, topographic variety - Kopka, Obanga, Waweig.

61. Whitewater Lake - bathing beaches, camping and lodging sites, boating.

62. Beaches, lodging and camping sites, waterfalls, and viewing - Hawkeye, One Island Lake, Two Island Lake, south end Dog Lake, Silver Falls, etc.

63. Kakabeka Falls - rock formations.

64. Shebandowan, Athelstone, Kashabowie - beaches, lodging and camping sites.

65. Burchell - bathing beaches, lodging and camping sites.

66. French and eastern end Pickerel Lake - bathing beaches, lodging and camping sites.

67. Beaverhouse Lake - bathing beaches, lodging and camping sites.

68. Clearwater West and White Otter - bathing beaches, lodging and camping sites and historic log castle, boating.

69. Manion, Eltrut, Silvertip, Petit, Sandbeach, Mowatt - concentration of bathing beaches, lodging and camping sites.

70. Bending Lake - bathing beaches, lodging and camping sites.

71. Rainy Lake - bathing beaches, lodging and camping sites, boating.

72. Cecil and Sowden - bathing beaches, varied topography, lodging and camp sites, boating, Indian paintings.

73. Sturgeon, Bell, Shikag Lakes - bathing beaches, lodging and camp sites.

74. Minnitaki - bathing beaches, lodging and camp sites.

75. A concentration of intensive areas of Class 1, 2 and 3 units in which beaches are the primary attraction.

Legend for Figure A-11, continued

76. Silver Lake - bathing beaches, lodging and camping sites.

77. McIntosh Lake - bathing beaches, lodging and camping sites.

78. Pakwash Lake - bathing beaches, lodging and camp sites.

79. Trout Lake, Little Trout Lake - many large bathing beaches, lodging and camping sites.

80. Kapkik Lake - bathing beaches, camping and lodging sites.

81. Basket, Mameigweis, Indian, Sandbar, Agimak, Rawleigh, Osaquan Lakes - bathing beaches, lodging and camping sites, topographic variety, Indian paintings.

SOURCE: "Background Information and Approach to Policy Northeastern Ontario Planning Region." Ontario Government, Ministry of Natural Resources. A report of the Strategic Land Use Plan, First Draft, 1975.
Strategic Land Use Plan. Background Information and Approach to Policy: Northwestern Ontario. Ontario Government, Ministry of Natural Resources. 2nd Ed. Toronto: Province of Ontario, September 1974.
Interview with Mark Cressman, Land Use Co-ordination Branch, Ontario Government. Ministry of Natural Resources, Toronto, Ontario, 6 January 1976.

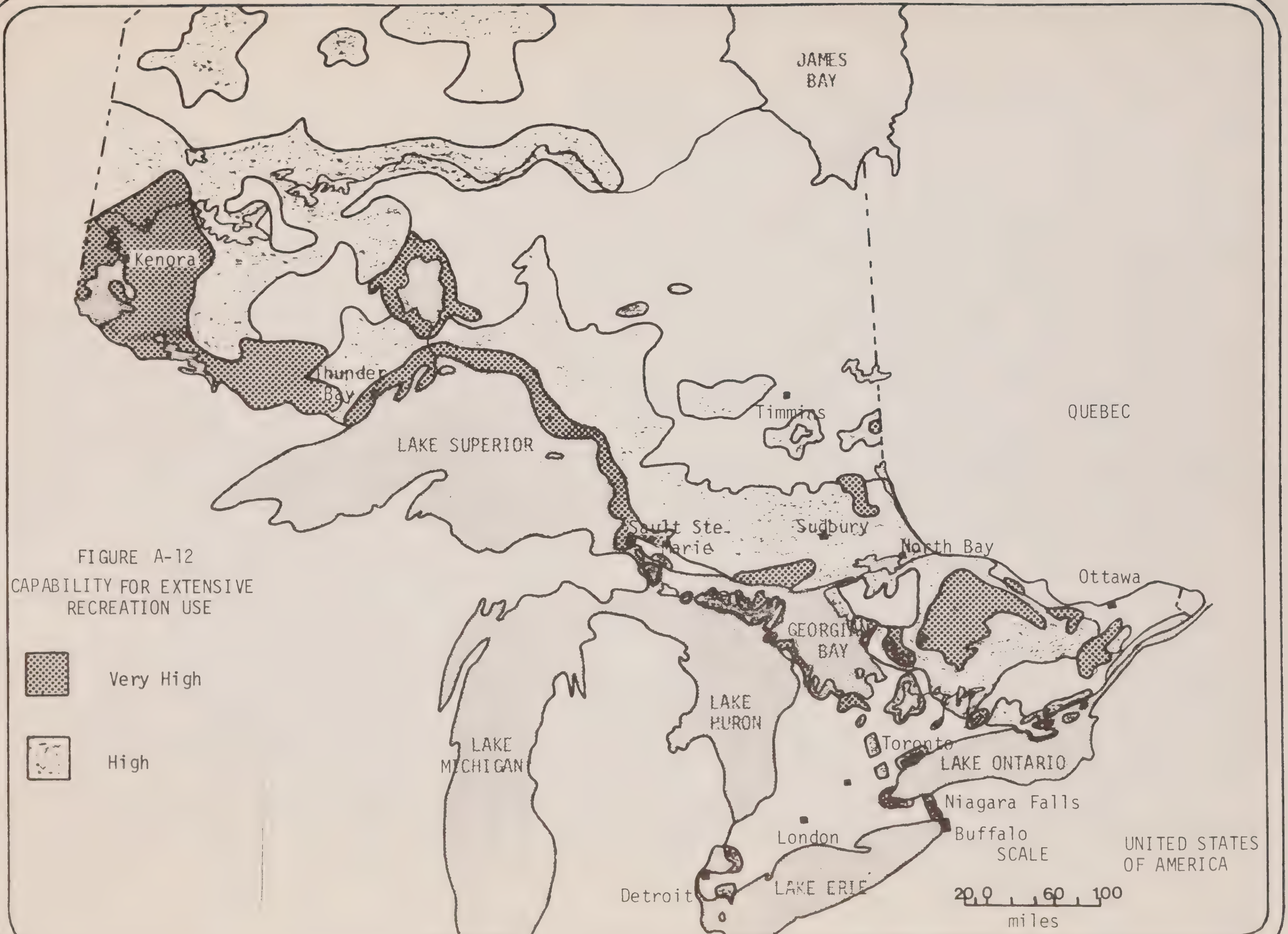
ii. Extensive Recreation Capability (Figure A-12)--A number of major areas in Southern Ontario with outstanding capability for extensive recreation use include portions of the Niagara Escarpment (e.g., Bruce County, Collingwood area, Hamilton-Dundas area), the Georgian Bay-Parry Sound shoreline, Muskoka Lakes, Haliburton Highlands, Algonquin uplands, the Rice Lake area, St. Patrick Fault in Renfrew County, Rideau Lakes, and the Lake-on-the-Mountain area. Other areas of high capability include much of the Precambrian Shield. The Great Lakes shoreline is rated from high to moderate for extensive recreation use. Many smaller areas within Southern Ontario have moderate to high ratings and are important regionally or locally in that they are features which, together with the other areas mentioned, form a linear network. These include the Oak Ridges moraine, the Oro Hills and the many river valleys.

Four major areas within Northeastern Ontario are rated as having very high capability for extensive use recreation. These areas are: Temagami - Lady Evelyn Lake, Killarney Highlands - North Channel, the Lake Superior shorelands and the Garden River (Mississagi Valleys). The balance of the region shows a gradient for recreation capability ranging from moderate to very low. Of special note is the generally low rating of the northern part of the region compared with the higher rating for the south. Toward the north, the lower rating is due to a lack of interesting topography coupled with a lack of attractive and usable water bodies. Very few of the areas ranked high for intensive recreation have special significance from a Provincial perspective. The parts of the region rated high for extensive use recreation capability do, however, display Provincial significance.

The Killarney area offers canoeing and walking opportunities that are not found anywhere else in the Province. The boating waters of the North Cahnnel are reputed to be among the best in the world. Agawa Canyon is another feature of the region that has Provincial significance for extensive (as well as intensive) recreation use.

Another important aspect of extensive recreation use is hunting and fishing and the Northwestern Ontario Region offers varied opportunities for both uses. Of special note in this regard is the shoreline of Hudson and James Bay. Here, the capability for goose hunting is rated very high

FIGURE A-12
CAPABILITY FOR EXTENSIVE RECREATION USE



and is considered to be of international significance. Details on fish and wildlife capability follow in this section (above discussion adapted from Ministry of Natural Resources, 1975).

The capability for extensive recreation in Northwestern Ontario, as shown on Figure A-12, includes broad considerations for such uses as canoeing, walking and dispersed cottaging. Areas of high capability have both an interesting topographic setting and a varied water pattern. Areas of lesser rank have a deficiency of either water or topography. In general, the highest capability in the region for extensive recreation is the southern portion where a combination of extensive and varied water pattern and interesting topography exist together (e.g., Lake of the Woods, Rainy Lake). Toward the north, the capability becomes lower as the topography becomes less interesting; however, the smaller lakes and river patterns offer a type of recreation not found elsewhere in the region.

iii) Sensitive Areas--In the past, sensitive areas have been determined on the basis of their uniqueness. To date, very detailed studies of sensitive areas have been completed for northern Ontario. However, because the present means for identifying sensitive areas is open to a high degree of subjective interpretation, the process is now under review.

In many cases, sensitive areas are important because they are critical to meeting the program objectives of the Ministry of Natural Resources. In other cases, they may be important as natural interpretive areas or as gene pools for species maintenance. These latter areas are readily damaged by certain developments because many of the features are either fragile or dependent upon an ecosystem that is in itself fragile. Unique historical features form yet another basis for the selection of sensitive areas.

The broad sensitive areas which have been defined by the Ministry of Natural Resources include:

a. Hudson Bay and James Bay Lowlands - due to the wildlife habitat and the delicate nature of the area in general;
b. The North Shore of Lake Superior - valued due to the superb scenery;
c. Georgian Bay and adjacent shallow soiled areas - this includes part of the Niagara Escarpment, the Thirty Thousand Islands, the Killarney Highlands and the waters of Georgian Bay and North Channel;

d. The Niagara Escarpment;

e. The marshes of Lake Erie, Lake Ontario and Lake St. Clair - valued for their unique wildlife habitat; and

f. The fisheries of Lake Nipissing and French River.

On the other hand, all of the sensitive areas, except the Hudson Bay and James Bay Lowlands, exhibit high to outstanding potential for either intensive or extensive recreation. In the entire Hudson Bay and James Bay Lowlands and the marshes of Lake Erie and Lake St. Clair, development must be relatively restricted because of the extremely delicate nature of the environment. Careful management and cautionary development appear to be the responses which best reflect the needs of the other sensitive areas. Certainly no development decisions should be implemented in the latter areas, without consulting properly qualified individuals to closely scrutinize the proposal and to determine probable impacts.

While a number of these sensitive areas are desirable locations for tourism visitation, decisions regarding their development must certainly be tempered by the concerns which are expressed in their designation as sensitive areas.

f. Use of Natural Resource Base

In Ontario, a wide variety of outdoor recreation opportunities are provided on both public and private land. These activities become an integral part of tourism when participation in such activities draws non-residents into an area, thereby contributing outside dollars to the economy of that locality. Frequently, it is extremely difficult to separate outdoor recreation benefits to residents from tourism benefits attributable to non-resident participation.

In the following discussion, participation in some of the more popular outdoor recreation activities, which are highly dependent upon features of the natural resource base, is examined. (It should be noted that the nature of the discussion is restricted by the availability of statistical information.)

i) Angling.--In 1970, 2.43 million anglers were fishing in Ontario, pro-producing a total of 40.8 million angler days and spending over 300 million dollars. Residents (1.62 million) accounted for 66.8 percent of all anglers, 86.5 percent (35.3 million) of the angler-days and 63.7 percent ($200 million) of the expenditures (Ontario Angling, 1970).

'Fly-in' fishing occurs in areas of Northeastern and Northwestern Ontario that are not accessible by road. In Northeastern Ontario, there are fly-in fishing opportunities between Highway 17 and Highway 11, north of Sudbury, Elliot Lake and Sault Ste. Marie and south of Timmins and Kapuskasing. In Northwestern Ontario, fly-in fishing occurs north of Highway 17 and south of the Albany River and in the interior area lying between Highways 17 and 11 west of Thunder Bay. There are 58 air services and 242 fishing lodges currently in operation.

In 1971 there were 806,000 non-resident anglers in Ontario (comprising 33.2% of all anglers), but only 13.5% (5.5 million) of the angler-days. However, the non-resident visitors produced 36.3% ($114 million) of the gross expenditures. The differences in the number of angler-days and expenditures for each group are responsible for variation in expenditures per angler-day by residents, as compared to non-residents; $5.70 per angler-day and $20.80 per angler-day, respectively.

Table A-2 outlines the number and cost of fishing licenses sold to non-Ontario residents during 1975.

Further 1970 information indicated that non-residents, fishing in Ontario, average 2.8 trips to the Province each year. They fish on 72 percent of these trips and 68 percent of the trips are made specifically for fishing. For Ontario-resident anglers, popular associated activities are boating, touring, hiking, viewing, visiting a cottage and camping (Ontario Recreation Survey, 1973-74).

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*Some 1970 statistics were used because complete information was available for that year. The 2.4 million anglers fishing in Ontario during 1970 is a conservative estimate. The survey of 1970 resident anglers indicated only 21 percent of the population fishing, while the Ontario Outdoor Recreation Survey indicated that 38.3 percent of the population fished in 1973-74. Since rough estimates of the rate of growth in angling participation are about 2 percent per year, most of the difference is probably due to an underestimate of the 1970 participation.

TABLE A-2

ONTARIO ANGLING LICENCES, 1975

LICENCE TYPE	APPROXIMATE NUMBER SOLD TO OCTOBER 1975	COST OF LICENCE	REVENUE
Non-Resident Annual	435,300	$10.75	$4,679,500
Non-Resident Three-Day	143,400	6.00	860,400
Canadian Resident (excluding Ontario Residents)	20,200	4.00	80,800
TOTAL	598,900		$5,620,700

Source: Ministry of Natural Resources, Sports Fisheries Branch, February, 1976.

Table A-3 indicates that the majority of people fishing in Ontario have an annual family income of $5,000 to $14,999. Most, however, have an annual family income of $5,000 to $9,999. While non-residents fishing in Ontario form the group with the largest percentage of anglers in the over $14,999 category, their numerical significance is not great.

TABLE A-3

PERCENTAGE OF RESIDENT AND NON-RESIDENT ANGLERS BY ANNUAL FAMILY INCOME

INCOME CATEGORY	% OF RESIDENT AND NON-RESIDENT ANGLERS			
	ONTARIO* RESIDENTS	MANITOBA* RESIDENTS	OTHER NON-RESIDENTS	ALL U.S. FRESHWATER ANGLERS OVER 12 YEARS
Under $5,000	16	12	11	17
$5,000-$9,999	55	59	33	43
$10,000-$14,999	22	16	32	28
over $14,999	8	13	24	13
TOTAL	100%	100%	100%	100%

*Adult males licenced to fish in Ontario

Source: Ministry of Natural Resources, Sports Fisheries Branch, 1973, Page 33.

Total annual expenditures associated with sport fishing in Ontario (Table A-4) indicate that non-residents, who represent only 33 percent of the anglers and 13.5 percent of the angler days, account for 71.55 percent of the expenditures on food and lodging, 66.06 percent of the expenditures on guides and fishing services and 85 percent of the expenditures on licences. Resident anglers, on the other hand, account for 68.78 percent of the travel expenditures and 90.23 percent of the expenditures attributed to associated expenditures. It is necessary to note that associated expenditures represent one-third of the total annual expenditures, in order to prevent the over-emphasis of the overall significance of non-resident expenditures.

TABLE A-4

TOTAL EXPENDITURES ASSOCIATED WITH SPORT FISHING IN ONTARIO

TYPE OF EXPENDITURE	AMOUNT OF EXPENDITURE					
	RESIDENTS	% OF TOTAL EXPENDITURE	NON-RESIDENT	% OF TOTAL EXPENDITURE	TOTAL	% OF TOTAL EXPENDITURE
Food and Lodging	$ 26,200,000	28.45	$ 65,900,000	71.55	$ 92,100,000	100
Travel	44,500,000	68.78	20,200,000	31.22	64,700,000	100
Guides, Fishing Services	5,600,000	33.94	10,900,000	66.06	16,500,000	100
Licences	900,000	15.0	5,100,000	85.0	6,000,000	100
Associated Expenditures	122,800,000	90.23	13,300,000	9.77	136,100,000	100
TOTAL	$200,000,000	63.41%	$115,400,000	36.59%	$315,400,000	

Note: Resident expenditure figures are estimated from data supplied by a U.S. Survey of (U.S.) Resident Anglers.

The demand for sport fishing is increasing in all parts of the Province. Fishing in Southern Ontario is growing at approximately two percent per annum. Considering demand only, there will be a considerable deficit in angler days by 1991 in the Ministry of Natural Resources Central Administrative region and considerable surpluses in the other three southern Ministry of Natural Resources regions (Ministry of Natural Resources, 1974, pp. 136-138).

The demand for sport fishing within Northeastern Ontario is projected to increase from 8.8 million angler-days in 1970 to 16.3 million days of angling by 1991 (Ministry of Natural Resources, 1974).

By 1991 it is estimated that angling activity in Northwestern Ontario will almost double to a level of 7.1 million user days (Ministry of Natural Resources, 1974).

In terms of tourism, high success fishing opportunities are likely to be available only in Northern Ontario, in areas not accessible by road. Fly-in fishing, therefore, if packaged well, will increase in popularity. However, as new roads are built and more of the north becomes accessible, trophy fishing will be pushed continually north.

In Southern Ontario and all other road-accessible areas, where heavy fishing pressures currently exist, the nature of fishing activity will change. Fishing will most likely become part of an outdoor experience, in which other activities are at least equally as important as fishing itself.

Currently, stocking programs in Ontario (i.e., Splake in Georgian Bay, Salmon in Lake Ontario, etc.) and different management techniques are being tried. However, the success of these programs will not be obvious for approximately twenty years, since the results of a successful regeneration program are not realized for many years after the program is initiated. One problem associated with the regeneration program is that many areas are over-fished before the fish are able to successfully reproduce. Some of the possible controls that might be used in the future to overcome this problem, are increased licence fees, required licences for all residents, decreased limits on the number of fish allowed per person and shortened fishing seasons.

Presently, a major problem connected with fishing in the Great Lakes is the high P.C.B. count, which renders the fish unfit for human consumption. This must be resolved in the future if the Great Lakes are to provide the number of angler days required to satisfy the future fishing demand in this area.

It is important to realize that the future of fishing opportunities in Ontario is highly dependent upon the concerns and the proposed policies of the Ministry of Natural Resources, which is responsible for sports fisheries in Ontario.

Information provided by the Sports Fishery Branch in 1976 indicates that by the year 2000 the only surplus opportunities in terms of angler-days will be available in Northwestern Ontario and, to a lesser degree, in Northcentral and Southwestern Ontario. Virtually all of the surplus from the Southwestern Region must come from the Great Lakes, assuming that rehabilitation efforts are successful. In addition, the Northern Region may have a surplus, depending on the status of currently unsurveyed lakes. It should be noted that the validity of these predictions is dependent on the success of management programs.

ii) Hunting--Hunting serves a tourism function attracting people to the Province from other Canadian provinces, the United States and, to a lesser extent, other countries, thereby bringing external dollars into Ontario. Hunting also moves people around within the Province. The most popular types of hunting for non-residents include moose, deer, bear and wild fowl, especially geese and duck.

A comparison of the number of hunters and hunter days in Ontario for moose, deer, bear and small game hunting during the years from 1969 to 1974 is outlined in Table A-5. For moose hunting, the number of resident and non-resident hunters and hunter days increased in overall terms from 1969 to 1974. The number of resident and non-resident deer hunters decreased significantly over the six year period. In that same time period, the number of resident and non-resident deer hunters decreased; however, the number of resident deer hunting days has shown an overall increase between 1970 and 1974.

In 1973, non-residents represented about 88 percent of the licenced bear hunters in Ontario. While the number of non-resident bear hunters declined between 1972 and 1973, the number of licenced resident hunters

TABLE A-5

HUNTING STATISTICS FOR MOOSE, DEER, BEAR AND SMALL GAME, 1969-1974

TYPE OF GAME	YEAR	RESIDENTS		NON-RESIDENTS		TOTALS	
		NUMBER OF HUNTERS	NUMBER OF HUNTER DAYS	NUMBER OF HUNTERS	NUMBER OF HUNTER DAYS	NUMBER OF HUNTERS	NUMBER OF HUNTER DAYS
Moose	1969	46,540	-	14,740	-	61,280	-
	1970	51,240	426,000	10,090	77,300	61,330	503,300
	1971	52,180	457,500	11,020	81,000	63,200	538,500
	1972	60,620	517,000	12,490	91,500	73,110	608,500
	1973	74,240	637,800	16,990	130,100	91,230	767,900
	1974	75,370	630,300	16,850	121,900	92,200	752,100
Deer	1969	86,490	-	5,230	-	91,720	-
	1970	80,220	473,500	3,870	22,200	84,090	495,700
	1971	77,600	462,500	4,600	26,700	82,200	489,200
	1972	81,800	489,000	4,800	26,500	86,600	515,500
	1973	82,390	462,300	4,930	27,900	87,320	490,200
	1974	80,380	487,100	3,990	23,600	84,370	487,100
Bear	1971	1,030	6,800	9,010	48,400	10,040	55,200
	1972	1,120	7,400	9,300	47,500	10,420	56,900
	1973	1,220	12,900	9,140	62,200	10,360	75,100
Small Game	1970	263,700	4,464,000	-	-	263,700	4,464,000
	1971	267,870	3,842,500	8,450	80,000	276,320	3,922,500
	1972	236,460	3,647,000	-	-	236,460	3,647,000
	1973	247,240	3,356,000	7,960	57,700	255,200	3,413,700

Source: Ministry of Natural Resources, Wildlife Branch, 1974, p. 36.

showed a marginal increase. Both the number of resident and non-resident small game hunters showed a decrease between 1970 and 1973.

The main destinations of moose hunters in Ontario in 1974 are detailed in Figure A-13. The areas attracting the largest numbers of moose hunters are around the Kirkland Lake, Thunder Bay, Chapleare and Geraldton districts. A significant number also hunt in the North Bay, Sudbury, Temagami, Gogama, Timmins, Cochrane and Nipigon districts.

Figure A-14 outlines the destinations of deer hunters in Ontario in 1974. The greatest number of hunters are attracted to the Parry Sound, Bracebridge, Minden, Bancroft, Tweed, Pembroke and Owen Sound districts and to Manitoulin Island. Deer hunting is concentrated in more southern portions of Ontario, as compared to moose hunting, which occurs mainly in the northern areas of the province.

According to Figure A-15, the greatest numbers of non-resident bear hunters are found in the Chapleau, Kirkland Lake and Blind River districts. A relatively large proportion of bear hunting also occurs in the Espanola, Sudbury, North Bay, Temagami, Wawa, Dryden and Kenora districts. It is important to note that in the case of moose, deer and bear hunting, the areas under the greatest pressure by hunters are all road accessible.

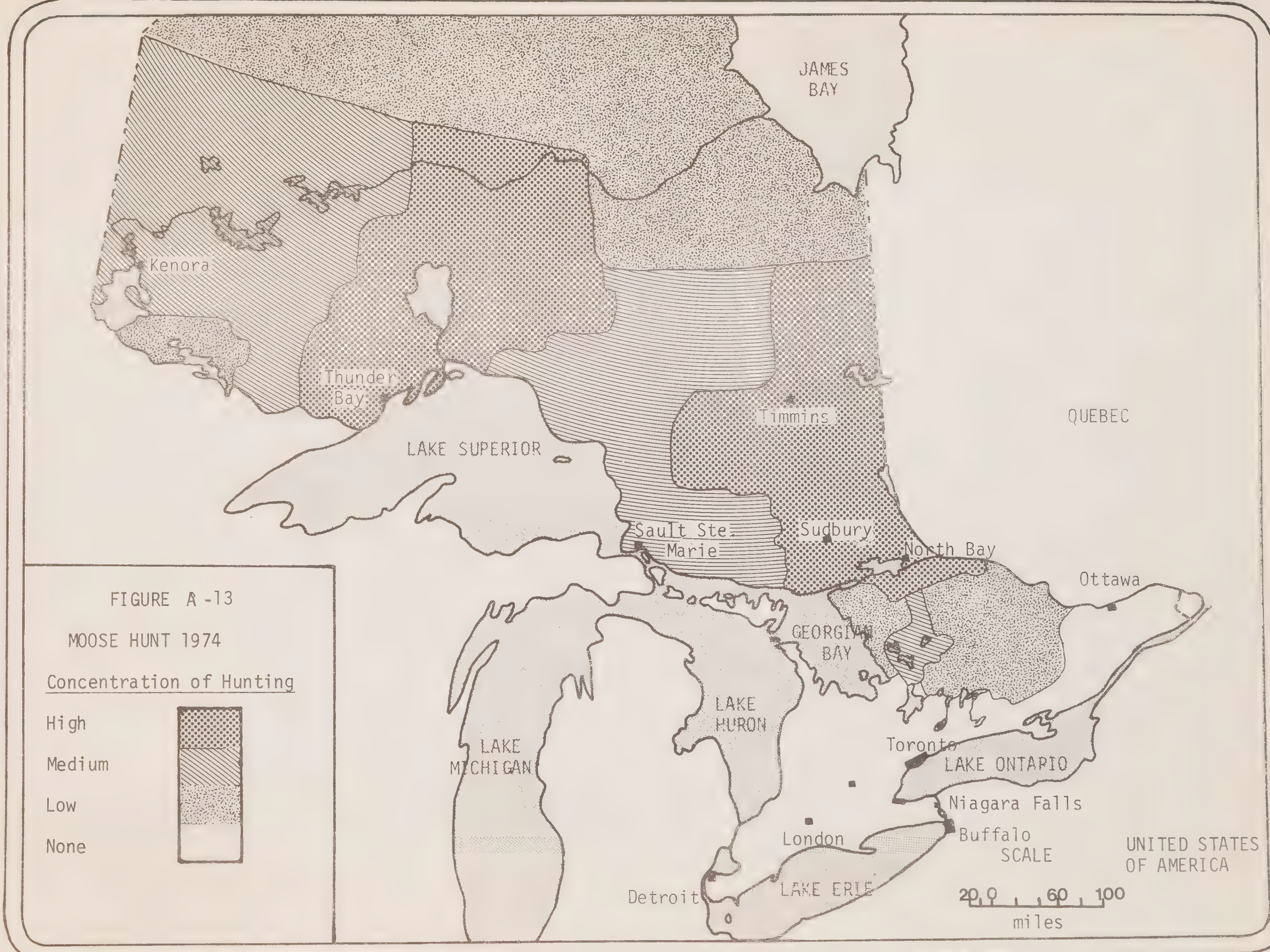

FIGURE A-13

MOOSE HUNT 1974

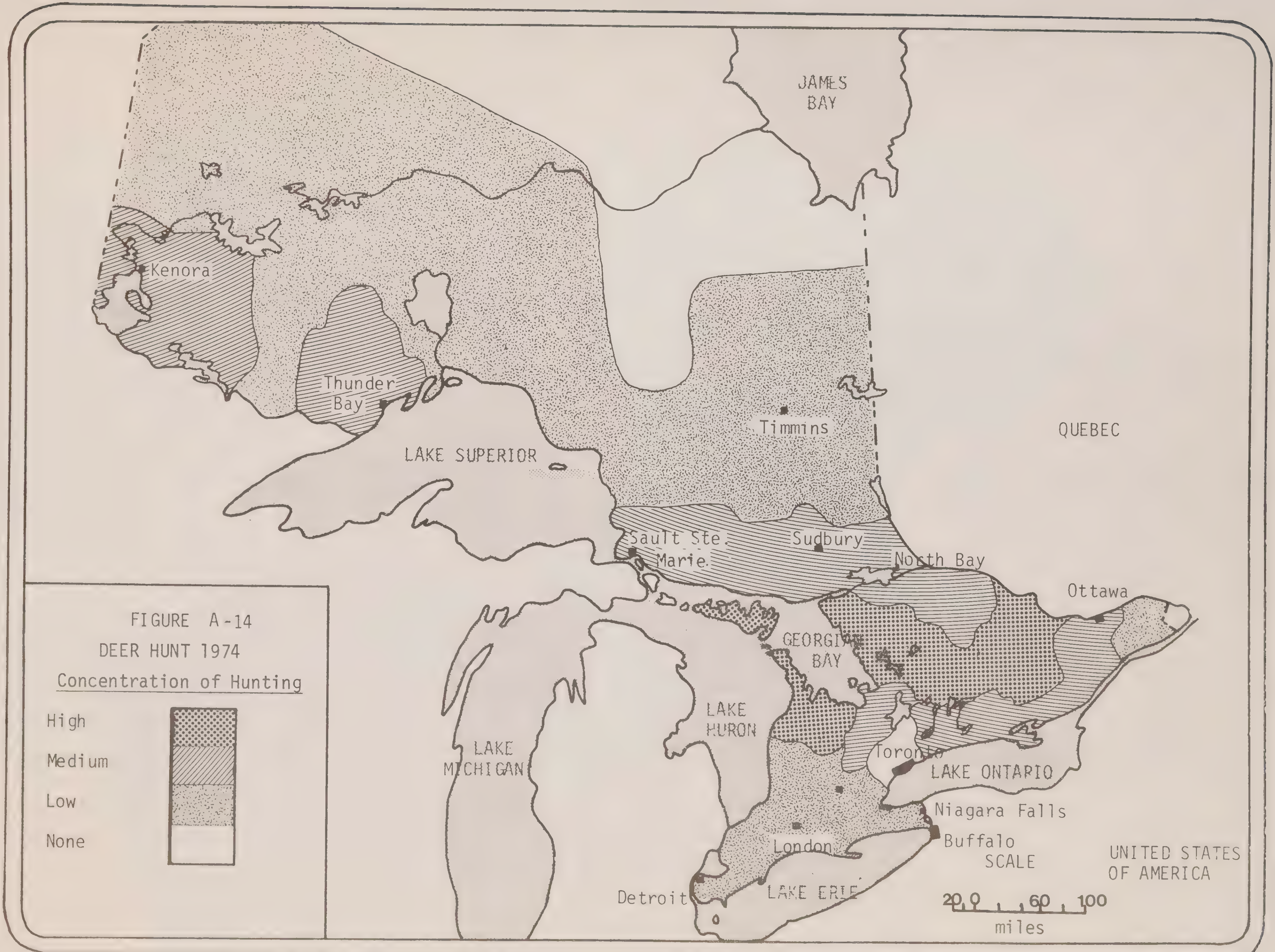

FIGURE A-14
DEER HUNT 1974

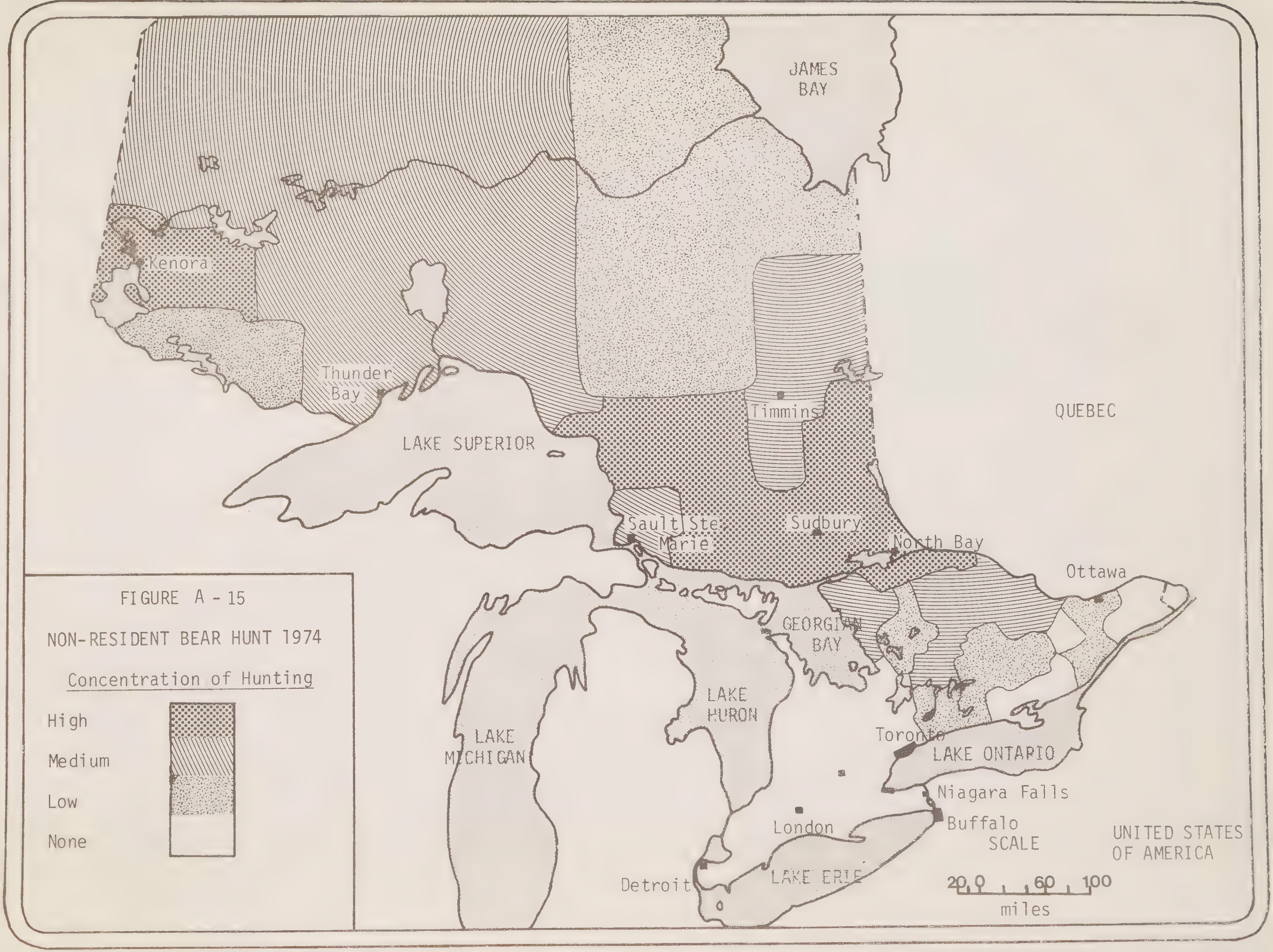

FIGURE A - 15

NON-RESIDENT BEAR HUNT 1974

The total expenditures made by resident and non-resident hunters in 1973 to 1974 are outlined in the following table.

TABLE A -6

TOTAL EXPENDITURES BY HUNTERS
IN ONTARIO*, 1973-1974

TYPE OF HUNTING	ESTIMATED TOTAL EXPENDITURES(IN $)		
	RESIDENTS	NON-RESIDENTS	TOTAL
Small Game	44,323,000	2,458,000	46,781,000
Summer	3,557,000	-	3,557,000
Deer	9,432,000	1,243,000	10,675,000
Moose	13,791,000	6,070,000	19,861,000
Bear	255,000	2,336,000	2,591,000
TOTAL	71,358,000	12,107,000	83,465,000

Source: Ministry of Natural Resources, Wildlife Branch, 1974, p. 37.
* Excluding licence fees.

Although total resident expenditures are significantly higher than total non-resident expenditures, it is important to note that the total number of resident hunters is also much higher.

The average expenditure per hunter is detailed in Table A -7 . It is evident that non-resident expenditures are substantially higher than resident expenditures. All expenditures for non-residents are higher, with the exception of equipment and ammunition. This is probably due to the usage of commercial accommodation by the majority of non-resident hunters, as opposed to cottages and hunt camps by residents.

TABLE A -7

AVERAGE EXPENDITURE PER HUNTER, 1973-1974

TYPE OF HUNTING	RESIDENT/ NON-RESIDENT	AVERAGE EXPENDITURE PER HUNTER (IN DOLLARS)						
		EQUIPMENT	TRAVEL	ACCOMMODATION	FOOD AND BEVERAGE	MISCELLANEOUS	AMMUNITION	TOTAL
Moose	Resident	54.6	51.8	14.9	46.5	18.3		186.1
	Non-Resident	54.1	92.6	95.4	61.5	53.8		357.4
Deer	Resident	33.2	20.9	18.5	30.3	11.9		114.8
	Non-Resident	28.4	54.8	85.1	47.6	36.7		252.6
Bear	Resident	74.3	34.6	31.9	32.8	17.4	18.6	209.6
	Non-Resident	19.7	61.6	87.8	48.6	34.5	3.6	255.8
Small Game	Resident	58.0	41.7	12.3	35.4	14.0	17.9	179.3
	Non-Resident	24.1	78.6	78.4	62.4	45.8	19.7	309
Summer		114.4	36.5	5.8	24.6	10.3	25.6	217.2

Source: Ministry of Natural Resources, Wildlife Branch, February, 1976.

A comparison of resident and non-resident licence fees is outlined in the following table.

TABLE A-8
COMPARISON OF RESIDENT AND NON-RESIDENT FEES

TYPE OF HUNTING	LICENCE FEE	
	RESIDENT	NON-RESIDENT
Moose	$15.00	$175.00
Deer	$10.00	$ 40.00
Bear	$10.00	$ 15.00
Fox, Game Birds Racoon, Squirrel, etc.	$ 3.00	$ 35.00

Source: Ministry of Natural Resources, Summary of Hunting Regulations, 1975.

All of the non-resident licence fees are significantly higher than the resident fees. Preliminary analysis of 1975 statistics indicate that non-resident moose hunting dropped considerably during this year. Representatives of the Wildlife Branch feel that this is due to the high fees for non-resident hunting licences.

The future of hunting in Ontario depends upon the effectiveness of the management programs. The currently available supply will not meet future demands. The problem of overharvesting in accessible areas and surpluses in non-road accessible areas must be solved. Fly-in hunting, if packaged properly, could provide a viable solution to this problem. Therefore, packaging of hunting opportunities, from a tourism perspective, will become more important.

The Ministry of Natural Resources policy, regarding the future of hunting in Ontario, states that for the Province as a whole, the relative position of hunting will be maintained in terms of user days per capita. This will vary for each of the planning regions, especially in Southern Ontario, where there will be a slight decrease from maintaining the status quo level in the hunting days provided in Central Ontario and a slight increase beyond

status quo in all other parts of the Southern Ontario planning region. The policy further states that, for the Province as a whole, there will be a slight increase in the tourism benefits associated with hunting. These policy statements are based on the following assumptions:

a. due to urban sprawl and changing land ownership, provision of wildlife recreational opportunities will become increasingly difficult in the densely populated parts of Southern Ontario.

b. provision of wildlife recreational opportunities in rural areas will become more difficult due to agricultural practices resulting in loss of wildlife habitat.

c. wildlife recreation will be maintained by an extension program complemented by acquisition and management programs which will allow:
   i) increases in hunting recreation in all but Central Region and keep losses in that Region slight.
   ii) increases in viewing opportunities in all southern Regions.

d. big game (moose) hunting in Northern Ontario can be increased by as much as 50 percent, if more access is provided in certain areas and if management programs are initiated (Ministry of Natural Resources, 1975, pp. 37-38).

Hunting is very important to tourism, particularly because it occurs during the shoulder seasons. The hunting program could be an important contributor to the tourism revenue. Lodge based hunters are especially desirable as tourists, due to their large expenditures.

iii) Public Recreation Areas.--Public recreation areas play a significant role in the provision of day-use and vacation-oriented recreation opportunities in Ontario. The main types of non-urban recreation areas are National Parks, Provincial Parks, Conservation Areas and Crown Land. The various parks provide varying kinds and degrees of recreational opportunities. For example, Recreation Parks, in the Provincial Park Classification System, offer intensive year-round recreational opportunities. Alternatively, development areas in National Parks are usually limited and are not designed to sustain massive amounts of recreation use. For some areas, such as Nature Reserves, the provision of recreation opportunities is secondary to its preservational purpose. However, all of the different types of areas, when viewed together, provide a varied system of recreational opportunities for Ontario residents and out-of-province visitors.

National Parks are operated by the Federal Government. Their purpose is "to preserve for all time areas which contain significant geographical, geological, biological or historic features as a national heritage for the benefit, education, and enjoyment of the people of Canada " (Ministry of Natural Resources, 1974, p. 124). Because of this, National Parks offer a unique experience to the traveller, and therefore, act as a tourist attraction in the area in which they are located. In addition to their preservational nature, these parks contain limited opportunities for a limited variety of outdoor recreation activities, such as wilderness hiking and organized camping.

There are three National Parks in Ontario, all located in Southern Ontario. They are Thousand Islands National Park, Point Pelee National Park and Georgian Bay Islands National Park. They encompass a total of 10,738 acres, which is only a small percentage of the total public park acreage in Ontario.

In Northwestern Ontario, there is one National park currently under development, called Pukaskwa National Park. It is located adjacent to Lake Superior, just south of Marathon, and has a park area of 464,000 square miles. This will add a significant number of acres to the National Park system in Ontario.

Visitation to the three National Parks located in Southern Ontario was 823,083 people in 1974, with 457,147 at Point Pelee, 140,665 at Georgian Bay, and at Thousand Islands, 226,271 people (Ministry of Natural Resources, 1974, p. 124).

For Pukaskwa National Park, 75,000 visitor days were projected by the Ministry of Natural Resources for 1975 and 250,000 by the year 2000. It was predicted that 90 percent of these visitors will come from outside of the region. This should result in a significant impact on the regional economy, in terms of both the jobs created and the dollars spent.

At the provincial level, the Ministry of Natural Resources operates a variety of park types, offering the recreationist a wide range of experiences. The objective of the outdoor recreation programme of the Ministry of Natural Resources is:

a. to provide from public lands and waters, and to encourage on other land and waters, a wide variety of outdoor recreational opportunities accessible to, and for the continuous benefit of the people of Ontario;

b. the identification and conservation of unique or representative physical, biological, cultural and historical features of the Province; and

c. a continuous contribution to the economy of Ontario from Tourism and its related industries (Ministry of Natural Resources, 1975, Preface).

Crown land recreation, park reserves and provincial parks all contribute to the achievement of the above objective.

In order for the Provincial Park system to attain the above objectives, the Ministry of Natural Resources developed a broad spectrum of parks, which differ in size, location, quality of natural features, and recreational capability. In order to facilitate the rational planning and administration of a balanced system, the parks were designated according to the "classification of provincial parks in Ontario." According to the system, there are five different Provincial Park classifications in the Province:

1. Recreation Parks,
2. Natural Environment Parks,
3. Wild River Parks,
4. Primitive (Wilderness) Parks, and
5. Nature Reserves.

Provincial parks serve as an attraction, essentially for the Ontario resident. However, they also attract the out-of-province visitor. They provide recreational opportunities, in addition to serving a conservational, preservational or historical function, in some instances. Many

provincial parks provide accommodation, in the form of camping, and therefore, they have the potential to draw people to the area for significant periods of time. This encourages people to spend money in the area on related services, such as food, entertainment, and so on.

Currently, there is a total of 120 provincial parks, encompassing 10,488,839 acres, in Ontario. A breakdown of these parks, by classification and area of location, is outlined in Table A-9, and their locations are detailed in Figure A-19 (found on page 101).

From the table, it can be seen that the majority of provincial parks in Ontario are Recreation Parks, which provide intensive, year-round recreational opportunities. The next largest category is Natural Environment Parks which offer more extensive recreational activities, based on the unique natural or cultural features in the park. Nature Reserves, which offer only limited recreational pursuits, associated with enjoyment of their natural features, is the next largest category. There are only a few parks in each of the remaining categories.

A large number of the provincial parks (63) are located in Southern Ontario. These parks are fairly concentrated, especially along lake shores and in the Bruce Peninsula Area. Over half (39) are classified as Recreation Parks, with the next largest category (16) being Natural Environment Parks. There are 5 Nature Reserves and 3 Historical Parks, but no Primitive or Wild River Parks.

There are fewer parks (57) located in Northeastern and Northwestern Ontario; the majority are Recreation Parks. However, in relation to the total, they have a higher percentage of Natural Environment Parks and more parks in the Primitive and Wild River categories than in Southern Ontario. The Provincial Parks in Northern Ontario are not as highly concentrated as those in Southern Ontario, due to the smaller number of parks located over a much larger area of land. The majority are situated adjacent to major highways. Although Northeastern Ontario has fewer provincial parks than Southern Ontario, it has, by far, the largest acreage.

TABLE A-9

PROVINCIAL PARKS BY CLASSIFICATION TYPE

Park Class	N.W. Ontario		N.E. Ontario		S. Ontario		Total	
	No.	Acreage	No.	Acreage	No.	Acreage	No.	Acreage
Primitive (Wilderness)	1	1,150,404	2	6,036,369	0	0	3	7,186,773
Wild River	1	415,400	4	125,798	0	0	5	541,198
Nature Reserve	2	54,817	1	108	5	852	8	55,777
Natural Environment	5	68,141	13	646,837	16	1,915.337	34	2,630,315
Recreation	13	22,058	14	36,757	39	15,738	66	74,553
Historical	1	104	0	0	3	119	4	223
TOTALS	23	1,710,924	34	6,845,869	63	1,932,046	120	10,488,839

Source: Ministry of Natural Resources, Strategic Land Use Plan: Province of Ontario, 1975, p. 40.

This indicates that the parks located in the Northeastern Region are much larger than those in Southern Ontario. The parks in Northwestern Ontario also have larger acreages than those situated in Southern Ontario.

Usage of Provincial Parks is largely seasonal, since few parks have completely winterized facilities. However, several parks are currently operating throughout the winter season, depending on weather conditions and demand. Four parks, Sibbald Point, Arrowhead, Pinery and Rondeau, operate with full facilities during the winter. It is probable that this trend, towards year-round usage of these parks, will continue.

All provincial park facilities and services are available, for public usage, from about May or June to September or October.

Table A-10 outlines a statistical comparison of provincial park usage for the years from 1968 to 1975. These figures indicate that the number of vehicle entries and the visitation rates to provincial parks increased from 1968 to 1971 and then began a slow decline to 1974. In 1975, there was a minor increase in the number of visitors to provincial parks. The increase experienced from 1968 to 1971 could have been due to the growth in the actual number of provincial parks.

The numbers of people camping in provincial parks also increased steadily between the years 1968 to 1971; declined slightly in 1972 and began to grow again during 1973, 1974 and 1975. The increases from 1968 to 1971 may have been due to the growing number of provincial parks. However, those increases experienced in 1973 and 1974 indicate a growing popularity of this activity.

The average length of stay of visitors to provincial parks remained fairly constant between the years 1968 to 1974. The number of days varied only slightly from 2.2 to 2.3. These figures would appear to indicate that many camping trips occurred on weekends.

The occupancy rates for the years 1968 to 1974 indicate a steady increase up to 1971, a decline in 1972, and growing rates over the next two years.

TABLE A-10

STATISTICAL COMPARISON 1968-1975

Year	Parks	Vehicle Entries	Visitation	Total Interpretive Contacts	Camper Origin by % Ontario	Camper Origin by % Other Provinces	Camper Origin by % U.S.A.	Number of Campers	Number of Camper Days	Average Length of Stay (days)	July-Aug. % Occupancy
1968	96	2,588,242	9,440,211	661,598	69	7	24	1,119,912	2,457,801	2.2	51
1969	97	2,946,228	10,459,936	774,097	69	7	24	1,360,639	2,956,214	2.2	55
1970	108	3,468,758	12,172,254	754,021	68	6	26	1,531,528	3,524,322	2.2	60
1971	113	3,903,368	13,658,619	892,760	68	6	26	1,618,948	3,788,525	2.3	62
1972	115	3,652,935	12,320,794	796,709	68	6	26	1,498,479	3,291,559	2.2	53
1973	115	3,585,161	12,136,909	894,314	68	6	26	1,600,817	3,547,215	2.2	58
1974	117	3,286,106	11,031,651	919,286	68	6	26	1,615,677	3,702,059	2.3	62
1975	120	3,401,619	11,237,745	NA	NA	NA	NA	1,636,563	3,928,615	NA	NA

Source: Ministry of Natural Resources, Ontario Provincial Parks: Statistical Report (1974 and 1975), p. 3.

Note: Based on 1970 survey data extrapolated for years 1971-1974.

The origin of campers to provincial parks is also outlined in Table A-10. These figures remained fairly constant over the seven years, with only a slight decrease in the numbers of campers from Ontario and other Canadian provinces and a corresponding increase in visitors from the U.S.A. The statistics show that Ontario residents are by far the largest user group (68 percent in 1974), followed by Americans (26 percent) and other Canadians (6 percent).

The following table outlines the age of campers visiting provincial parks for 1973 and 1974.

TABLE A-11

AGE OF CAMPERS VISITING PROVINCIAL PARKS

Age Group	Percentage of Total Number of Campers	
	1973	1974
1 - 12 years	30	30
13 - 19 years	14	14
Over 19 years	55	55

Source: Ministry of Natural Resources, Provincial Parks: Statistical Report (1973, 1974), pp. 35 and 37.

According to these statistics, almost half (44 percent) of the campers were 19 years of age or younger. Thirty percent were 12 years of age or under, indicating a high incidence of family camping.

The nature of camping trips taken to provincial parks in 1974 is examined in the following table.

TABLE A-12

NATURE OF CAMPING TRIPS

Nature of Visit to Provincial Park	Percentage of Total Visitors to Provincial Parks
A Destination	52
A Stop-Over	47

Source: Ministry of Natural Resources, Provincial Parks: Statistical Report (1974), p. 37.

The percentage of people, within the various age groups, visiting the 11 provincial parks surveyed, is outlined in Table A-13.

TABLE A -13

AGE OF DAY VISITORS

Age Group	Percentage of Total Day-Use Visitors
1 - 14	31.8
15 - 24	22.5
25 - 44	31.7
45 - 64	11.2
65+	2.9
Total	100.0

Source: Ministry of Natural Resources, Ontario Provincial Parks: Statistical Report (1974), p. 40.

These figures indicate that the majority of day-use visitors are under 44 years of age. The largest category is the age group between 1 - 14 years (31.8 percent), with the 25 - 44 year age group maintaining a very close second (31.7 percent). These statistics support the findings that families are the major day-visitor group to these parks.

Table A-14 outlines the visitor statistics for Provincial parks in 1975, by the ten economic regions. Over 11 million park visits were recorded in Ontario, during this year, the largest percentage occurring in the Northeastern Region. The St. Clair, Lake Ontario and Georgian Bay Regions, respectively, have the next highest visitation rates.

Future plans of the Parks Division, in the Ministry of Natural Resources, include:

1. development of recreational parks near urban areas for day-use (e.g., similar to Bronte Provincial Park);
2. implementation of the Master Plans for Algonquin and Quetico Provincial Parks (hopefully this will stimulate greater Canadian usage of Quetico--American visitations now constitute 91 percent of the park's user-days); and
3. upgrading of existing parks as the need arises.

Park reserves are areas of land set aside for the purpose of future park development. Although they are not presently developed as parks, they do provide recreational opportunities in the form of nature-oriented activities (e.g., hiking, canoeing, cross-country skiing, etc.).

TABLE A-14

VISITATION STATISTICS FOR ONTARIO
PROVINCIAL PARKS, 1975

Region	Number of Vehicles	Number of Daily Permits	Total Number of Visitors
St. Clair	433,550	81,897	1,607,943
Lake Erie	218,121	12,580	766,015
Niagara	35,656	4,185	124,993
Mid-Western Ontario	37,388	3,161	130,937
Georgian Bay	402,784	68,138	1,417,754
Central Ontario	183,985	30,334	597,364
Lake Ontario	454,544	73,293	1,499,164
Eastern Ontario	248,509	36,093	851,596
Northeastern Ontario	1,032,842	71,485	3,117,846
Northwestern Ontario	354,240	26,540	1,124,133
TOTALS	3,401,619	407,706	11,237,745

Source: Ministry of Natural Resources, Provincial Parks: Statistical Report (1975)

The number and acreage of park reserves are outlined, by region, in Table A ·15. It is evident that Southern Ontario has, by far, the largest number of park reserves. However, park acreages indicate that these reserves are much smaller than those located in Northwestern and Northeastern Ontario. In total, there are 100 park reserves with an acreage of 1,218,049.6. There are no usage statistics available at the present time.

A significant proportion of recreation and tourism occurs in an unorganized manner on Crown Lands in Northeastern and Northwestern Ontario. The most popular activities include swimming, picnicking, camping, hunting, angling, canoeing and boating.

There are 240 officially designated access points to Crown Land in Northwestern Ontario. However, many more sites are situated along roads or located along the lakeshores and canoe routes in the hinterland. In Northeastern Ontario, there are 207 access points and 74 canoe routes, with many more non-designated areas throughout the region.

The amount and type of usage associated with Crown Land is currently unknown. However, studies are being conducted in order to eliminate this void.

The prime concern of the Conservation Authorities is the conservation of soil and water, through flood control, erosion prevention, open space protection, etc. Many of these areas also provide opportunities for recreational activity. Due to their location near urban centres, they are particularly suited for day-use by city residents, although some do provide opportunities for individual or group camping.

There are currently 288 conservation areas located in Ontario, 64 of which have individual or group camping facilities. Northeastern and Northwestern Ontario have five each, with the remainder situated in Southern Ontario.

The 1974 user information is in the process of being analyzed by the Conservation Authorities. It was, therefore, not available for utilization.

TABLE A-15

PARK RESERVES, BY REGION

Region	Number of Reserves	Acreage of Reserves	Percentage of Total Acreage
Algonquin	17	97,103.83	
Central	26	23,737.58	
Southwestern	5	1,825.53	
Eastern	5	2,184.00	
TOTAL for Southern Ontario	53	124,850.94	10.25
Northern	12	154,621	
Northeastern	9	156,824	
TOTAL for Northeastern Ontario	21	311,445	25.57
North Central	21	400,277.5	
Northwestern	5	381,476.25	
TOTAL for Northwestern Ontario	26	781,753.75	64.18
TOTAL	100	1,218,049.6	100.0

Source: Ministry of Natural Resources, Park Reserve Review Chart (March, 1975)

Note: Ministry of Natural Resource's Administrative Regions

3. Attractions and Events

Attractions and events are essential components of the tourism plant. They provide significant motivation for people to travel. Without these developments, tourism as we now know it could not exist. Attractions and events are important, from both an economic and cultural viewpoint. Attractions, even if they are free of charge, have an economic impact in an area, by resulting in increased spending on related services. Once visitors have been drawn to the area, the need arises for lodging, food services, entertainment and purchases of products, all of which bring money into the region. These services, therefore, are highly dependent upon attractions.

Attractions and events also provide an excellent medium through which cultural values can be maintained, through developments such as Fort William and Upper Canada Village, and through activities like the Stratford and Shaw Festivals and Oktoberfest.

The focus in this section will be on cultural, historical and man-made (industrial, educational, amusement and theme/historical) attractions and events. Natural attractions, with the exception of Niagara Falls, which is the focal point for many other types of attractions and events, have been dealt with in the natural features section of this appendix.

a. Definition of Terms

Attractions and events can be distinguished as follows. An attraction is a natural or man-made feature, generally of a permanent nature, whose primary appeal is its physical appearance or the experience it provides. Its basic design seldom changes, and related activities or the interrelationship of people are often secondary to it. The success of an attraction may be measured quantitatively by the number of people it draws, or qualitatively by the contribution it makes to the quality of life in the surrounding area.

An event, on the other hand, is an organized activity, which generally spans a definite time period and promotes local atmosphere, by using any natural, industrial, historical, cultural, social, recreational

and/or sports oriented theme as a basis for the activity. The format may change from time to time in order to stimulate involvement. The interaction of people is the prime goal of an event, and its success may be measured by the number of people it attracts.

The Province of Ontario has a wide variety of attractions and events available to the traveller. For the purpose of this plan, only those which are either provincially or regionally significant have been considered. In order to determine provincial or regional significance, initial discussions were held with the Marketing Branch, in the Tourism Division, and a list of events and attractions regarded as provincially or regionally significant were obtained. These lists were taken to the regions, during regional visits, and a concensus was drawn.

An attraction or event has been termed provincially significant if it has major historical, cultural, entertainment or educational qualities, and is capable of consistently drawing visitors from all areas of Ontario, other provinces and foreign countries.

Regional attractions and events are smaller in scale, may be important within a particular region, do not attract substantial numbers of visitors from outside that particular region and may evolve into a provincially significant facility as reputation and appeal grow.

b. Existing Supply

The attractions and events of provincial significance are outlined in Tables A-16 and A-17 and Figure A-16, and those of regional significance in Tables A-18 and A-19. They have been divided according to the economic regions devised by T.E.I.G.A.

The type classification describes, in general terms, the orientation or character of the opportunities; the attractions and events have been classified as one or a combination of the following:

i) cultural,
ii) historical,
iii) agricultural,
iv) recreational (e.g., general, social, shopping, viewing),

v) educational, and

vi) business.

Many of the attractions and events provide a number of these elements, and certainly all afford the visitor recreational and educational experiences, in the broad sense of the word. Only their major focus is listed, however, in order to determine geographically clustered attractions and events of a particular nature, so that statements about themes can be made.

It is apparent from Tables A-16 and A-17 and Figure A-18, that most attractions and events of provincial significance are located in Southern Ontario, with heavy concentrations around the Toronto, Ottawa and Niagara Falls areas. There are few of provincial significance in Northeastern or Northwestern Ontario, with the exception of Fort William in Thunder Bay, the Sailing Regatta in Kenora and the Polar Bear Express, originating in Cochrane.

The regionally significant attractions and events do not have the appeal required to bring in external dollars on their own. Clusters do occur, however, and where viewed together, have the potential of drawing people from other regions and perhaps from out of province. Attraction clusters occur:

i) around London and Windsor in Southwestern Ontario;

ii) in the Kitchener/Waterloo/Guelph area (including smaller towns such as Elora, in Mid-Western Ontario);

iii) in Brantford, Hamilton, Niagara Falls and surrounding cities, such as St. Catherines, Welland, Crystal Beach and Niagara-on-the-Lake, in the Niagara Region;

iv) in Midland, in the Georgian Bay Region;

v) in Toronto and surrounding area, in Central Ontario;

vi) in Peterborough, in the Lake Ontario Region; and

vii) in Kingston and Ottawa in Eastern Ontario.

Clusters of events occur in the St. Catharine's/Niagara Falls area, Toronto and Ottawa.

It is important to note that all of the provincially significant attractions and events and clustered developments are located in connection with major cities. This indicates that a sizeable local market is essential in order to economically justify the development of attractions and events.

On examination of the types of attractions and events currently available in Ontario, some general themes become apparent:

i) a recreational theme in the areas around London and Kingsville, with a slight historical emphasis around the Windsor area, in Southwestern Ontario;

ii) an historic/cultural theme in Midwestern Ontario, focussing on the indigenous German and Mennonite populations, and centred around Kitchener/Waterloo, Guelph and Aberfoyle;

iii) in the Niagara Region, a recreational theme, with an emphasis on scenic viewing around the Hamilton, Niagara Falls and Welland areas;

iv) a cultural/historic theme, centred around 19th Century military operations and Indian populations, indigenous to the area, is evident in the Brantford, Fort Erie, Niagara Falls, Niagara-on-the-Lake and Welland areas;

v) a historic emphasis, based essentially on life among the Huron Indians and 19th Century military establishments, in Midland, Orillia, Owen Sound and Wasaga Beach, in the Georgian Bay Region;

vi) a recreational orientation revolving mainly around general recreation activities, shopping and sports activities, and cultural and historical themes (O'Keefe Centre, The Royal Alexander Theatre, the Royal Ontario Museum, and Black Creek Pioneer Village) exists in Central Ontario focussing on Toronto, with Oshawa, Kleinburg and Campbellford having single attractions; and

vii) in Northeastern Ontario, a slight orientation toward historical attractions and events, based on mining and, to a lesser extent, 18th Century military operations, centred around North Bay, Sudbury, Kapuskasing and St. Joseph's Island, and in addition, a recreation theme, based mainly on viewing, emerges in Sudbury, Sault Ste. Marie and St. Joseph's Island.

TABLE A-16

ATTRACTIONS OF PROVINCIAL SIGNIFICANCE BY ECONOMIC REGION

LOCATION	ATTRACTION	TYPE	SUPPLIER
MIDWESTERN ONTARIO			
Stratford	Stratford Festival . internationally acclaimed Stratford Theatre featuring unique and excellent productions each year	Cultural	Private, Non-Profit
Kitchener	Kitchener's Farmers Market . old world Amish and Mennonite farm produce	Agricultural/ Cultural/ Shopping	Municipal
NIAGARA			
Niagara Falls	Niagara Falls . natural attraction consisting of two cataracts (American Falls and Horseshoe Falls)	Recreational - scenic viewing	Niagara Parks Commission
Niagara-on-the-Lake	Shaw Festival . theatre presentations of plays written by George Bernard Shaw and his contemporaries	Cultural	Private, Non-Profit
	Fort George and Related Historical Sites	Historical	Parks Canada
Fort Erie	Old Fort Erie . typical early 19th Century fortification, containing relics of the War of 1812	Historical	Niagara Parks Commission
Rockton	African Lion Safari . 500 acre, open space wildlife preserve	Recreational - wildlife viewing	Commercial
GEORGIAN BAY			
Midland	Sainte Marie Among the Hurons . recreation of the first inland European community in Canada	Historical	Ministry of Culture and Recreation
Tobermory	Manitoulin Island Car Ferry	Recreational Travel	Ministry of Transportation and Communications
Penetanguishene	Naval and Military Establishments . reconstructed British Naval and Military establishments	Historical	Ministry of Culture and Recreation
CENTRAL ONTARIO			
Toronto	C.N. Tower . tallest self-supported structure in the world, revolving restaurant	Recreational - viewing, dining	Canadian National Railways
	Royal Ontario Museum . Ontario's most extensive museum	Cultural/ Historical	Ministry of Culture and Recreation

continued . . .

TABLE A-16, continued

LOCATION	ATTRACTION	TYPE	SUPPLIER
CENTRAL ONTARIO			
Toronto, continued	Ontario Legislative Buildings	Historical	Province of Ontario
	Metro Toronto Zoo . 710 acres open zoo; animals inhabit a natural environment; 5,000 exhibits	Recreational - wildlife viewing - educational	Private, Non-Profit
	Casa Loma . castle built in 1914	Historical	
	City Hall . contains Nathan Phillips Square, "the city's courtyard"	Cultural/ Recreational - scenic viewing	Municipal
	O'Keefe Centre . 3,200 seat theatre, presenting a wide variety of popular stage shows, opera, ballet, concerts, etc.	Cultural	Municipal
	Ontario Place . 96 acre complex of man-made islands in Lake Ontario. Includes pavilions, cinesphere, Children's Village, domed theatre, etc.	Cultural/ Recreational - general	Ministry of Industry and Tourism
	Ontario Science Centre . more than 500 exhibits, many participatory	Recreational - educational	Ministry of Culture and Recreation
	Maple Leaf Gardens . large arena, for professional hockey, basketball, concerts, etc.	Recreational - sporting events	Commercial
	Black Creek Pioneer Village . reconstructed rural Ontario village, circa 1840-60	Historical	Metropolitan Toronto and Region Conservation Authority
	Art Gallery of Ontario and The Grange . second largest collection of Canadian Art The Grange was the first home of the gallery and is the oldest brick house still standing in Toronto	Cultural/ Historical	Ministry of Culture and Recreation
Kleinburg	McMichael Collection of Art . collection of paintings by the famous Group of Seven Canadian artists and their contemporaries	Cultural	
LAKE ONTARIO			
Mosport	Mosport Park . internationally rated auto race track; site of Canadian Grand Prix	Recreational - sporting event	Commercial
Peterborough	Peterborough Lift Locks . highest hydraulic lift lock in the world	Recreational - scenic viewing - travel	Parks Canada

continued . . .

TABLE A-16, continued

LOCATION	ATTRACTION	TYPE	SUPPLIER
EASTERN ONTARIO			
Kingston	Old Fort Henry . extensive fortifications built in 1812; a museum of British and Canadian military history	Historical	St. Lawrence Parks Commission
Morrisburg	Upper Canada Village . showpiece of Canadiana circa 1800	Historical	St. Lawrence Parks Commission
Ottawa	Parliament Buildings . seat of Canadian government	Historical	Federal Government
	National Arts Centre . 2,300 seat opera house, 800 seat theatre, 300 seat studio	Cultural	Federal Government
	National Gallery of Canada . a variety of art pieces on permanent display; includes a comprehensive collection of Canadian paintings and drawings	Cultural	Federal Government
	National Museum of Man and National Museum of Natural Sciences . relate the history of man to his natural environment	Cultural/ Educational	Federal Government
	National Museum of Science and Technology . history, principles and applications of science	Educational	Federal Government
	Fort Wellington . fortified post, built 150 years ago, and rebuilt in 1837	Historical	Parks Canada
	Royal Canadian Mint . production of Canadian currency	Historical	Federal Government
	National Aeronautical Collection . history of aviation in Canada	Historical	Federal Government
	Canadian War Museum . Canada's military history	Historical	Federal Government
	Changing of the Guard	Recreational - viewing	Federal Government
NORTHWESTERN ONTARIO			
Thunder Bay	Fort William . reconstruction of old trading post	Historical	Ministry of Culture and Recreation
	Big Thunder Ski Jump . international class jumping facility	Recreational	Thunder Bay Ski Jumps Ltd.

continued . . .

TABLE A -16, continued

LOCATION	ATTRACTION	TYPE	SUPPLIER
NORTHEASTERN ONTARIO			
Sault Ste. Marie	Agawa Canyon Excursions . one day train tours, in summer and winter, in Algoma Central Country	Recreational - travel - scenic viewing	Algoma Central Railway
Cochrane	Polar Bear Express . day long rail ride from Cochrane to Moosonee	Recreational - travel - scenic viewing	Ontario Northland Railway
St. Joseph Island	Fort St. Joseph . 18th Century British Fort, situated in a 700 acre national park	Historical/ Recreational - general	Parks Canada

TABLE A-17

EVENTS OF PROVINCIAL SIGNIFICANCE BY ECONOMIC REGION

LOCATION	EVENT	TYPE	SUPPLIER
Midwestern Ontario			
Kitchener/Waterloo	Oktoberfest . German Festival, held annually	Cultural/ Recreational -social	Private, Non-Profit
Elmira	Elmira Maple Syrup Festival . sugaring-off festivities	Cultural/ Recreational -social	Municipal
Niagara			
Niagara Falls	Blossom Festival . complete with parades, ethnic dances and sporting events	Agricultural/ Recreational -general	Private, Non-Profit
St. Catharines	93rd Royal Canadian Henley Regatta . one of North America's largest rowing regattas	Recreational -sporting	St. Catharines Chamber of Commerce
	Niagara Grape and Wine Festival . ten days of celebrating the grape harvest	Agricultural/ Recreational -general	Private, Non-Profit
Central Ontario			
Toronto	Canadian National Exhibition . largest annual exhibition in the world	Cultural/ Agricultural Historical/ Recreational -general business-related	Municipal
	Royal Agricultural Winter Fair . North America's outstanding agricultural exhibition, featuring the Royal Horse Show	Agricultural Recreational -general -business-related	

continued . . .

TABLE A-17, continued

LOCATION	EVENT	TYPE	SUPPLIER
Toronto, continued	Canadian National Sportsman's Show . display of sporting goods and recreational activities	Business-related Recreational -general	Commercial
	Toronto International Boat Show	Business-related Recreational -general	Commercial
	Queen's Plate . oldest continuous horse race in North America	Recreational -sporting event	Commercial
	Mariposa Folk Festival . international festival of folk, blues and other forms of musical entertainment	Cultural/ Recreational - social	Private, Non-Profit
	Metro Toronto Caravan . 60 pavilions, featuring international food, drinks, entertainment and handcrafted souvenirs	Cultural/ Recreational -general	Private, Non-Profit
<u>Lake Ontario</u>			
Mosport	Can Am International Motor Racing	Recreational -sporting event	Commercial
	Canadian Grand Prix .features the world's leading Formula "1" drivers	Recreational -sporting event	Commercial
<u>Eastern Ontario</u>			
Ottawa	Canadian Tulip Festival . parades, fireworks and regattas	Cultural/ Recreational -general	Federal Government

continued . . .

TABLE A-17, continued

LOCATION	EVENT	TYPE	SUPPLIER
Ottawa, continued	Central Canada Exhibition . featuring a Grand Stand Show, horse show, midway, exhibits and agricultural displays	Agricultural/Recreational -general -business-related	Private, Non-Profit
Northwestern Ontario			
Kenora	International Lake of the Woods Sailing Regatta	Recreational -sporting event	
Thunder Bay	Canadian Ski Jumping Championships	-sporting event	Commercial

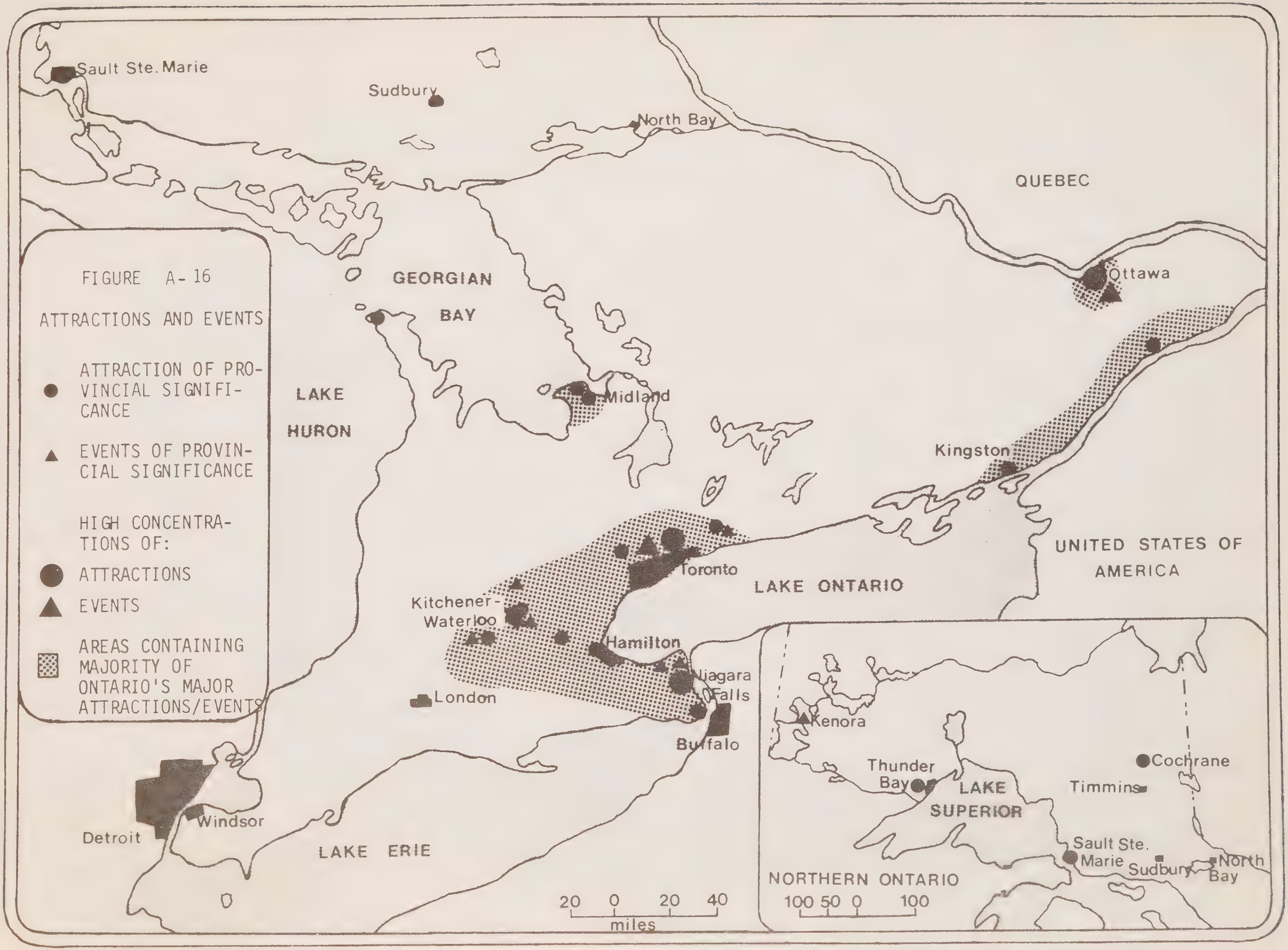
FIGURE A-16
ATTRACTIONS AND EVENTS
ATTRACTION OF PROVINCIAL SIGNIFICANCE
EVENTS OF PROVINCIAL SIGNIFICANCE
HIGH CONCENTRATIONS OF:
ATTRACTIONS
EVENTS
AREAS CONTAINING MAJORITY OF ONTARIO'S MAJOR ATTRACTIONS/EVENTS
Sault Ste. Marie
Sudbury
North Bay
QUEBEC
Ottawa
GEORGIAN
BAY
LAKE
HURON
Midland
Kingston
UNITED STATES OF
AMERICA
Toronto
LAKE ONTARIO
Kitchener-
Waterloo
Hamilton
Niagara
Falls
London
Buffalo
Detroit
Windsor
LAKE ERIE
20 0 20 40
miles
Kenora
Thunder
Bay
LAKE
SUPERIOR
Cochrane
Timmins
Sault Ste.
Marie
Sudbury
North
Bay
NORTHERN ONTARIO
100 50 0 100

TABLE A-18

SELECTED ATTRACTIONS OF REGIONAL SIGNIFICANCE BY ECONOMIC REGION

LOCATION	ATTRACTION	TYPE	SUPPLIER
SOUTHWESTERN ONTARIO			
Kingsville	Jack Miner's Bird Sanctuary . feeding grounds for large flights of geese and other wildfowl	Recreational - wildlife viewing	Private
London	Storybook Gardens . children's park - a "fairyland" of story-book characters	Recreational - viewing	Municipal
	Western Fair . annual exhibition, featuring exhibits, livestock, a midway, etc.	Agricultural/ Recreational - general	Private
	Western Fair Raceway . major focal point in Southwestern Ontario for harness racing, etc. (a fast growing spectator sport)	Recreational - sporting event	Commercial
Sarnia	Oil Museum of Canada . location of first oil well in Canada	Historical	Private
Amherstburg	Fort Malden National Historic Park	Historical	Federal Govern-ment
MIDWESTERN ONTARIO			
Aberfoyle	Aberfoyle Flea Market . the best in authentic antiques; restaurant in restored old mill	Historical Recreational - shopping	Commercial
Guelph	Colonel John McCrae Birthplace . home of famous poet	Historic	Private
	Kortright Waterfowl Park . waterfowl park, with interpretive displays of wetland wildlife	Recreational - wildlife viewing	Department of the Environment
	University of Guelph	Educational	
Kitchener	Doon Pioneer Village and Museum . presents visual history of the regime of Waterloo	Historical	Grand River Conservation Authority
	Woodside National Historic Park . boyhood home of William Lyon Mackenzie King	Historical	Parks Canada
	University of Waterloo	Educational	
	Sir Wilfrid Laurier University	Educational	
NIAGARA			
Brantford	Bell Homestead . home of Alexander Graham Bell	Historical	Municipal
	Brant County Historical Museum . portrays early pioneer life in Brant County	Historical/ Cultural	

continued . . .

TABLE A-18, continued

LOCATION	ATTRACTION	TYPE	SUPPLIER
NIAGARA			
Brantford, continued	Chiefswood . a literary shrine and museum, honoring poet E. Pauline Johnson	Historical/ Cultural	Private
	Her Majesty's Chapel of the Mohawks . only Royal Indian Chapel and the oldest protestant church in Ontario	Historical	
	Indian Village . authentic reproduction of an ancient Iroquois settlement	Historical/ Cultural	
Fort Erie	Fort Erie Race Track . one of North America's oldest race courses, yet one of the most modern tracks	Recreational - sporting event	Commercial
Hamilton	Canadian Football Hall of Fame . national shrine to Canadian Professional Football; traces the history of football over the past 100 years	Historical	Private, Non-Profit
	Dundurn Castle . 19th Century mansion built by Sir Allan Napier MacNab, Canadian Prime Minister from 1854 to 1856	Historical	
	Hamilton Place . cultural centre	Cultural	Municipal
	Royal Botanical Gardens . 2,000 acres of colorful displays	Recreational - scenic viewing	
	McMaster University	Educational	
Niagara Falls	Maid of the Mist . exciting boat trip in front of the American and Horseshoe Falls	Recreational - scenic viewing	Commercial
	Marineland and Game Farm . presents a tremendous array of wildlife in their natural habitat; features a regularly scheduled aquarium show	Recreational - wildlife viewing	Commercial
	Niagara Falls Museum . North America's oldest museum	Historical/ Cultural	
	Niagara Whirlpool Rapids	Recreational - scenic viewing	Niagara Parks Commission
	Niagara Tower . glass enclosed elevators for an exceptional view of Niagara Falls	Recreational - scenic viewing	Commercial
	Rainbow Tower Carrillou . set of 55 tuned bells, hanging in a tower, used for concerts	Recreational - scenic viewing	Niagara Parks Commission
	Sir Adam Beck Generating Station	Historical	Ontario Hydro

continued . . .

TABLE A-18, continued

LOCATION	ATTRACTION	TYPE	SUPPLIER
NIAGARA			
Niagara Falls, continued	Skylon Tower . three-level, dome tower with observation deck, revolving dining room and lounge	Recreational - general (shopping, scenic viewing, dining)	Commercial
	Spanish Aero Car . enclosed cable car carrying passengers above the whirlpool	Recreational - scenic viewing	Niagara Parks Commission
Niagara-on-the-Lake	Canadian Mime Theatre . productions by Canada's professional mime theatre group	Cultural	Private
St. Catharines	Garden City Raceway . features harness racing	Recreational - sporting event	Commercial
Welland	New Welland Canal	Recreational - scenic viewing - travel	Federal
	The Abandoned Canal	Historical	
Crystal Beach	Crystal Beach . amusement park; providing a midway in addition to the beach area	Recreational - general	Commercial
GEORGIAN BAY			
Bracebridge	Santa's Village . 18 acre storybook setting along the Muskoka River; unique children's attraction	Recreational - general	Commercial
Midland	Huron Indian Village . full scale replica of typical 17th Century native community	Historical	
	Huronia Museum . extensive collection of Huron Indian artifacts	Historical	
	Martyr's Shrine . National shrine to eight martyred Jesuit missionaries	Historical	
Orillia	Stephen Leacock Home . colonial mansion, designed and built in 1902 by the famous author, humorist and economist	Historical	
Owen Sound	Tom Thompson Memorial Art Gallery . paintings, drawings and artifacts relating to Tom Thompson's life, one of the famous Group of Seven	Historical	
Douglas Point	Bruce Nuclear Power Development . Canada's first and largest nuclear generating station and heavy water plant	Recreational - viewing structure - educational	Commercial

continued . . .

TABLE A-18, continued

LOCATION	ATTRACTION	TYPE	SUPPLIER
GEORGIAN BAY, Continued			
Wasaga Beach	Museum of the Upper Lakes . memorial to the schooner H.M.S. "Nancy", which ran British military supplies in the War of 1812	Historical	Ministry of Culture and Recreation
Collingwood	Blue Mountain Pottery Works	Recreational - viewing structure - educational	Commercial
CENTRAL ONTARIO			
Toronto	Commerce Court . four buildings surrounding a landscaped one-acre courtyard, underground concourse	Recreational - shopping, viewing	Commercial
	High Park	Recreational - general	Municipal
	Fort York	Historical	
	Hockey Hall of Fame . History of Canada's national game; Sports Hall of Fame	Historical/ Cultural	Private, Non-Profit
	Mackenzie House . home of William Lyon Mackenzie, Toronto's first mayor and leader of the rebellion of 1837	Historical	Municipal
	Marine Museum . history of shipping on the Great Lakes	Historical	
	McLaughlin Planetarium . theatre of the stars	Recreational - educational	Ministry of Culture and Recreation
	Royal Alexandra Theatre . restored Edwardian theatre	Cultural	Commercial
	St. Lawrence Centre for the Arts . an 830 seat theatre; 483 seat Town Hall for lectures, films and public forums	Cultural	Municipal
	Toronto Dominion Centre . towers and concourse	Recreational - shopping, viewing	Commercial
	Toronto Island Park	Recreational - general	Municipal
	University of Toronto	Educational	
	York University	Educational	
	Varsity Stadium . college football, soccer, etc.	Recreational - sporting events	

continued . . .

TABLE A-18, continued

LOCATION	ATTRACTION	TYPE	SUPPLIER
CENTRAL ONTARIO			
Toronto, continued	C.N.E. Stadium and Grounds	Recreational - sporting events - concerts	Municipal
	Woodbine Race Track . features horse racing	Recreational - sporting event	Commercial
	Greenwood Race Track . features harness racing	Recreational - sporting event	Commercial
Campbellville	Mohawk Raceway . features harness racing	Recreational - sporting event	Commercial
LAKE ONTARIO			
Peterborough	Lang Century Village . a community recreated from 1867	Historical	County of Peterborough
	Petroglyph Provincial Park . ancient Indian Rock carvings at Stoney Lake	Historical	Ministry of Natural Resources
	Serpent Mounds . large, serpent mounds, believed to be created in the first 3 centuries	Historical	Ministry of Natural Resources
EASTERN ONTARIO			
Brockville	Eastern 1000 Island Tours . sightseeing cruise	Recreational - scenic viewing - travel	Commercial
Gananoque	Thousand Island Boat Trips . sightseeing cruise	Recreational - scenic viewing - travel	Commercial
Iroquois	The Seaway Locks	Historical/ Recreational - scenic viewing - travel	Federal Government
Kingston	Bellevue House National Historic Site . restored Tuscan village, home of Sir John A. Macdonald, Canada's first prime minister	Historical	
	Royal Military College	Educational	
	Queen's University	Educational	

continued . . .

TABLE A-18, continued

LOCATION	ATTRACTION	TYPE	SUPPLIER
EASTERN ONTARIO, continued			
Ottawa	Canada Post Office	Historical	Federal Government
	Laurier House . residence of two former prime ministers, Sir Wilfrid Laurier and Right Honorable William Lyon Mackenzie King	Historical	
	Moorside - Mackenzie King Estate . old summer residence of William Lyon Mackenzie King	Historical	Historic Society of Gatineau
	Museum of Canadian Scouting . evolution and growth of the Boy Scout movement in Canada	Historical	Boy Scouts of Canada
	Rideau Canal Cruise . sightseeing cruise	Recreational - scenic viewing - travel	Commercial
	University of Ottawa	Educational	
	Carleton University	Educational	
Pembroke	Algonguin Indian History Museum	Historical	
NORTHEASTERN ONTARIO			
North Bay	Northern Ontario Trapper's Museum	Historical	
Sudbury	Canadian Centennial Numismatic Park . features the Big Nickel plus a model mine	Historical - recreational - viewing - educational	Commercial
	Laurentian University	Educational	
Cobalt	Cobalt Silver Mining . currently under development; restoration of early mining community	Historical	Ministry of Culture and Recreation
Kapuskasing	Spruce Falls Pulp and Paper Company . pulp mill	Historical - recreational - viewing structure	Commercial
Cochrane	Wilderness Canoe Trip . wilderness canoe trip following the route of the voyageurs	Recreational - scenic/ wildlife viewing - travel	Commercial
NORTHWESTERN ONTARIO			
Thunder Bay	Centennial Conservatory	Educational -viewing	Municipal
	Hillcrest Park	Recreational	Municipal
	Lakehead University	Educational	
Fort Frances	Fort St. Pierre	Historical	

TABLE A-19

SELECTED EVENTS OF REGIONAL SIGNIFICANCE BY ECONOMIC REGION

LOCATION	EVENT	TYPE	SUPPLIER
Southwestern Ontario			
Kingsville	Migration Festival . annual festival celebrating the goose migration	Recreational -wildlife viewing	
Windsor	International Freedom Festival . joint celebration by Windsor and Detroit of Dominion Day and Independence Day	Historical Recreational -social	Private, Non-Profit
Niagara			
Brantford	Six Nation's Indian Pageant . re-enactment of early Indian history and culture	Historical Cultural Educational	Private
	Brantford Highland Games . Scottish competitions and festivities	Cultural/ Recreational -social	
St. Catherines	Folk Arts Festival . two weeks of ethnic dancing, music and good food	Cultural -recreational -social	
Welland	Welland Rose Festival . a two week festival, with rose shows, a Rose Queen contest, etc.	Recreational -social	
Mid-Western Ontario			
Guelph	Spring Festival . features concerts, song and dance programs, chamber recitals and an art exhibit	Cultural	Private, Non-Profit

continued . . .

TABLE A-19, continued

LOCATION	ATTRACTION	TYPE	SUPPLIER
Northwestern Ontario			
Fort Frances	Fun in the Sun . a summer festival featuring canoe races, log rolling, sky diving, midway and marathon race	Recreational -social	
Atikokan	Voyageur Days	Recreational -social	
Emo	Emo Fall Fair . regional agricultural fair and midway	Recreational -social -educational	
Beardmore	Beardmore-Lake Nipigon Fish Derby	Recreational	Royal Canadian Legion
Kakabeka	Nolalu Fish Derby	Recreational	Royal Canadian Legion
Nipigon	Nipigon Fall Fishing Festival	Recreational	
Thunder Bay	Mt. McKay Indian Days Central Canada Pow Wow	Cultural Recreational	Mt. McKay Indian Band
	Elk's Pee Wee Hockey Tournament	Sports	Elks Club
	Canadian Lakehead Exhibition	Cultural -recreation-al -social	C.L.E.
	Rendezvous Pageant - Old Fort William	Cultural -educational -social	Ministry of Cul-ture and Recreation
	Northwestern Ontario Fur Traders' Fiddle Context	Cultural -educational -social	Vickers Heights Community Assoc.

continued. . .

TABLE A-19, continued

LOCATION	EVENT	TYPE	SUPPLIER
Georgian Bay			
Shelburne	Canadian Open Old Time Fiddler's Contest	Cultural	
Huntsville	Muskoka Calvacade of Colors . 2 week celebration; street dances, turkey feasts, fireworks, fairs, floats	Recreation-al -scenic viewing -social	
	Muskoka Winter Carnival . 10 day, winter festival	Recreation-al -social	
Central Ontario			
Oshawa	International Plowing Match and Machinery Show	Agricultur-al Recreation-al -social	
Toronto	Caribana . Caribbean festival on Toronto Island	Cultural Recreation-al -social	Private, Non-Profit
	Dockside . floating boat show	Recreation-al -viewing	
	Eaton's Santa Claus Parade . annual Christmas parade	Recreation-al -viewing	Commercial
Lake Ontario			
Haliburton	Haliburton Highlands Festival of Color	Recreation-al -social -scenic viewing	

continued . . .

TABLE A-19, continued

LOCATION	EVENT	TYPE	SUPPLIER
Eastern Ontario			
Ottawa	Festival Canada . a cultural, sporting and social celebration held during the month of July	Cultural Recreational -social	
Cornwall	Festival De La Semaine Francaise . week long celebration of French Canadian food, entertainment and events	Cultural/ Recreational -social	
Northeastern Ontario			
North Bay	North Bay Winter Fur Carnival . a winter festival, featuring dog sled racing, log chopping contests, sky-diving competitions and an ice show	Historical Cultural Recreational -social	Municipal
St. Joseph's Island	Algoma Maple Festival . sugaring-off celebration	Recreational -social	
Sault Ste. Marie	Bon Soo Winter Carnival . a winter festival, featuring a variety of sports, cultural and social activities	Recreational -social	Municipal
Cobalt	Miner's Festival . Fiddler's contest, step dancing, canoe marathon, etc.	Cultural Recreational -social	
Manitoulin	Wikwemikong Indian Pow Wow . Indian traditions portrayed in tribal dances, songs and ceremonies	Historical/ Cultural	

c. Usage by United States Visitors

In 1973 and 1974, travel figures were collected* from American visitors to Ontario outlining the main purpose of their trip to the Province; business trips were excluded from the data. The following discussion of purpose of trip was illustrated in Chapter III in Figure III-4. Although only two categories were directly related to travel for the purpose of visiting attractions and events ('special events' and 'see Niagara Falls'), other categories included such visitations. These were 'visit friends and relatives', 'touring' and'visit cities'.

Attending special events was a major reason for travel only in Midwestern Ontario. This was probably due to the high concentrations of attractions and events in this region (i.e., Stratford Festival, Oktoberfest, etc.) and its close proximity to the American border. Visiting Niagara Falls was the most significant reason for visiting the Niagara Region.

For all regions (excluding Northeastern Ontario, Lake Ontario and the Niagara Region) 'visiting friends and relatives' was among the top three reasons for United States visitation to the area. In Midwestern Ontario, Georgian Bay, Central Ontario and Eastern Ontario, the significant concentration of attractions and events could have provided part of the stimulus for this visitation. In Southwestern and Northwestern Ontario and the Lake Erie region, however, the lack of large clusters of attractions and events, would present a less significant stimulus for visitation.

A primary reason for travel by United States residents to Central Ontario was to 'visit cities'. This would appear to be primarily due to the location of Toronto in this region. High concentrations of attractions and events exist in this area, such as theatre, shopping facilities, sports complexes and historic buildings, providing a major reason for visitation.

"Touring" was significant in Northwestern Ontario. However, because of the general lack of attractions and events in this area, it is probable that the natural environment provided the primary impetus for 'touring'.

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*"United States Auto Exit Survey", 1973/74; plus adjusted figures from:
a) "Tourism Statistical Handbook", 1975;
b) "Survey of Visitors to Ontario", Government Travel Information Centres, 1968 to 1970; and
c) "Canadian Annual Vacation Pattern Survey", 1974

d. Usage by Visitors From Other Canadian Provinces

The main purpose of trips to Ontario for Other Canadians was detailed in Figure III-5 found in Chapter III. The only category relating specifically to visiting attractions and events was 'special events'. 'Visiting friends and relatives' and 'touring', however, probably had 'viewing attractions and events' as a secondary reason for travel.

'Attending special events' ranked among the top three reasons for travel to the Midwestern region only. This could have been due to the existence of such significant attractions and events in this area, such as the Stratford Festival and Oktoberfest.

'Visiting friends and relatives' was an important reason for travel to all of the regions, ranking first or second in each case. In areas such as Central Ontario, Niagara, Midwestern Ontario, Eastern Ontario and Georgian Bay, where large clusters of attractions and events are located, a visit to friends and relatives might include trips to attractions and events in the area. In Northwestern and Northeastern Ontario and the Lake Erie area, where few clusters exist, this is not likely to be a secondary reason for travel.

'Touring' was also a primary purpose for travel to all regions, with the exceptions of Northwestern and Midwestern Ontario. 'Touring' in Northeastern and Southwestern Ontario, Lake Ontario and in the Lake Erie and Georgian Bay regions is likely to be connected with the natural scenery. In the Niagara region and in Central and Eastern Ontario, historic, cultural and other man-made attractions and events likely constitute part of the reason for touring the area.

e. Visitation to Selected Attractions

Table A-20 outlines visitation trends for selected Ontario attractions for the years 1970 to 1975. With the exception of the Royal Ontario Museum and the Polar Bear Express, the number of visitors to each of the other attractions increased during the years 1970 to 1973. During 1974, visitation rates decreased for all attractions (where statistics were available), except for the Ontario Science Centre and the Polar Bear Express. The number of visitors increased again during 1975, but not sufficiently to reach the 1973 total.

TABLE A-20

ATTENDANCE TRENDS AT SELECTED ONTARIO ATTRACTIONS, 1970-1975

ATTRACTION	1970	1971	1972	1973	1974	1975
Upper Canada Village	291,103	323,433	335,538	355,111	N/A	N/A
Old Fort Henry	173,103	187,363	195,726	219,090	N/A	N/A
Ste. Marie Among the Hurons	129,432	144,166	128,959	134,258	131,463	N/A
Black Creek Pioneer Village	250,771	246,251	265,145	270,652	N/A	N/A
Canadian National Exhibition	3,171,000	3,210,000	3,561,000	3,572,500	3,255,200	3,481,500
Ontario Place	N/A	2,318,794	2,350,471	2,965,961	2,913,819	2,931,993
Ontario Science Centre	1,310,553	998,140	1,033,228	1,300,773	1,418,313	1,181,066
Royal Ontario Museum	954,905	981,149	1,372,929	1,054,544	N/A	N/A
Polar Bear Express	16,800	20,600	31,921	(up) 22,890 (back) 22,581	33,929 (up) 33,067 (back)	22,043 (up) 21,690 (back)
Art Gallery of Ontario	160,134	197,221	N/A	N/A	N/A	N/A
Toronto Zoo	N/A	N/A	N/A	N/A	510,445 mid-August	1,154,444

*Note: N/A - Information is not available.

Notable exceptions were the Polar Bear Express, where visitation rates dropped significantly in 1975.

The 1973 attendance figures for historic and cultural attractions located in Ontario are detailed in Table A-21 . The Ontario Science Centre had the largest number of visitors for that year. The second and third largest visitation figures were for the Royal Ontario Museum and Black Creek Pioneer Village. Attractions with the highest visitation rates (with the exception of the McMichael Canadian Collection) are located in, or are in fairly close proximity, to Metropolitan Toronto. This is probably an indication of the need for a large indigenous population to support attractions of this magnitude and a large, well-established urban centre to supply the historical and cultural setting as a backdrop to the attractions.

Historic sites, in particular the larger museums and centres, receive a substantial grant for operation, which in some instances exceeds budget figures; examples of this are the Royal Ontario Museum, the Ontario Science Centre, and the McMichael Canadian Collection. The smaller historical attractions, on the whole, receive less in the form of a grant, up to approximately fifty percent in some cases.

Detailed visitation statistics were available only for the Stratford and Shaw Festivals and Ste. Marie Among the Hurons. When comparing visitation statistics for the Stratford and Shaw Festivals (both classified as cultural festivals), an interesting comparison can be drawn which gives an indication about the market for this type of event. A high percentage of visitors to both settings were from Ontario--51.5 percent for the Stratford Festival and 68.4 percent for the Shaw Festival. Metropolitan Toronto was a prime origin with 16.7 percent for Stratford and 32.2 percent for Shaw. For Stratford, the majority of United States visitors came from Michigan and New York; the largest number of American visitors to the Shaw Festival were from New York. The average party size was slightly higher for the Shaw Festival with 4.1 persons as compared to 3.1 for the Stratford Festival. The age category most strongly respresented at Stratford was 20-29. The majority of Shaw visitors were somewhat older: the 40-49 years of age group provided the highest visitation. The majority of visitors to

TABLE A-21

1973 ATTENDANCE AT SELECTED HISTORIC AND CULTURAL ATTRACTIONS

NAME OF MUSEUM/HISTORIC PARK OR SITE	ATTENDANCE
Royal Ontario Museum	1,054,544
Archibald W. Campbell Memorial Museum	1,850
South Simcoe Pioneer Museum	2,493
Ontario Science Centre	1,300,733
The McMichael Canadian Collection	202,841
Lewis Bradley Pioneer Museum	2,484
Art Gallery of Ontario	194,098
Henry House Museum	2,128
Elliot Lake Mining and Nuclear Museum	2,583
The Glengarry Museum	1,320
Port Carling Pioneer Museum	8,035
Timber Village Museum	1,650
Lennox and Addington Historical Museum	1,260
Ska-Nah-Doht Indian Village Restoration	-
Ear Falls Historical Society	1,575
The Old Post Office	3,989
Fort Frances Museum	-
Cochrane Railway and Pioneer Museum	2,646
Bruce County Museum	9,578
Lundy's Lane Historical Museum	2,646
Lake of the Woods Museum	6,399
Markham District Historical Museum	3,850
Hope Sawmill	18,000
Strathroy Middlesex Museum	852
Muskoka Pioneer Village and Museum	7,700
The Ameliasburgh Museum	4,600
Joseph Brant Museum	7,150
Ermatinger Old Stone House	22,028
Pickering Township Museum	9,900
Cobalt Northern Ontario Mining Museum	11,000
Hastings County Museum	6,439
The County of Grey and Owen Sound Museum	11,607
Eldon House	12,650*
The Bell Homestead	66,000
St. Catharines Historical Museum	4,063
Todmorden Mills Museum Park	4,977
T. McKenzie Memorial and Mill of Kintail Museum	7,181
Wellington County Museum	3,302
Mackenzie House	24,876*
Doon Pioneer Village	57,526*

* 1972 figures adjusted upwards by 10%.

continued . . .

TABLE A-21, continued

NAME OF MUSEUM/HISTORIC PARK OR SITE	ATTENDANCE
Dundurn Castle	93,556
Historic Fort York	77,000*
Black Creek Pioneer Village	270,652
Bellevue House	46,538**
Bethune Memorial	-
Brock Monument	91,501**
Fort George	145,754**
Fort Malden	83,013**
Fort St. Joseph	9,783**
Fort Wellington	63,506**
H.M.S. Radcliffe	17,337**
Woodside	24,617**

**Fiscal Year Data: April 1 to March 31.

most settings were well-educated, with above average incomes and were employed in professional or managerial occupations. The average party expenditure was significantly lower for Shaw visitors ($47.30) compared to Stratford ($106.95).

A review of the characteristics of visitors to Ste. Marie Among the Hurons provides clues about the market potential of this type of attraction. It is classified as a historical attraction and drew a much higher percentage of Ontario residents than did the Stratford or Shaw Festivals (86.5 percent of adult/family parties), probably due to its more remote location and to school visitations. This attraction drew more people from the middle income bracket than did the Shaw or Stratford festivals, and also a fairly significant number from higher income levels. The highest percentage of visitors were from the professional category.

f. Future of Attractions and Events

Several trends have been forcast for Canada which will have an impact on the future demand for attractions and events in Ontario. By the year 1986, it is predicted that:

i) incomes will increase, resulting in more demand for packaged tours, especially for seniors, and a growing tendency to view travel as an integral part of the educational experience;

ii) there will be more women in professional and managerial positions, resulting in larger numbers of women travelling without male escorts, and therefore, more of a demand for artistic and cultural events;

iii) emphasis on the 'individual' will increase, leading to a greater demand for educational and cultural tours; and

iv) there will be more emphasis on aesthetic and environmental values (L. J. D'Amore and Associates Ltd., Synopsis of Views From Round I, Delphi Survey, Tourism in Canada 1986 (in progress).

All of these trends will have a significant impact on the types of attractions and events that will need to be developed in the future. Cultural and artistic events (e.g., hobby and craft festivals, drama and music festivals, etc.) and historical attractions will gain in importance, because of the educational, as well as recreational, experiences they afford.

For more detailed information about historical and cultural themes, refer to subsection 7 of the appendix. The historical and cultural themes already form the basis of major attractions and events in the Province; however, there is still significant potential for further development. The development of historical and ethnic themes may not necessarily entail construction of large scale attractions; it may merely involve improving or providing appealing atmosphere through minor enhancement, modification or restoration to support the existing physical plant.

In future, development themes could be utilized to unify and thus, draw together larger geographical areas in which a number of attractions and events or a number of clusters occur. These areas, rather than individual attractions and events, will become the destinations. The wider range of opportunities will assist initially in attracting the interest of more people and maintaining interest for longer time periods, thus encouraging greater lengths of stay by greater numbers of visitors.

Due to shifts in age groups and increases in disposable income, it is predicted that Canadians will travel more in the future and will take more vacations. As a result, there will be more winter and shoulder season vacations (L. J. D'Amore and Associates Ltd., pp. 1-2). This will necessitate the year-round operation of some attractions (e.g., through winterizing of facilities, hiring of permanent staff, etc.) and the development of more major events in seasons other than summer.

Attractions and events will remain urban-related. Since Southern Ontario has the highest urban population concentrations at the present time, and indications are that this will continue to be the case (refer to section 6), most of the attractions and events, and certainly all of the major man-made attractions and events will be further developed in Southern Ontario.

Due to increased energy and general living costs, and increased emphasis on environmental values, clustering of attractions will become more important. People will increasingly seek multi-dimensional vacation spots and packaged tours. Themes will be the unifying element, which over a large geographical area, will bind together the tourist zones and indicate the nature of the attractions and events required to support them.

This will necessitate the co-ordination of existing and proposed attraction and event clusters in order to reinforce the theme of an area. In addition to the development of themes, support systems such as transportation networks, service centres and restaurants, should be upgraded in order to supply a well-rounded and pleasurable travel experience for the tourist.

4. Accommodation

The variety, number and quality of available accommodation is an essential element of the overall tourism plant. It is important to note, however, that all tourism does not involve an overnight stay when the trip does involve a stay of one or more nights. This would necessitate expenditures on some form of accommodation (e.g., hotel, motel, resort, campground, etc.), food, and perhaps shopping and entertainment. Ontario is well supplied with a great number and variety of accommodation establishments. These range from commercial facilities (e.g., hotels, motels, seasonal resorts, rental cottages and cabins, etc.) to public facilities (e.g., national, provincial and municipal campgrounds, conservation areas, etc.) and finally, to privately owned dwellings (second homes). In this section and in the following chapter, the quantity, distribution and use of various types of accommodation in Ontario will be examined.

a. Existing Accommodation Resources in Ontario

i) Commercial Establishments.--There are approximately 112,694 units of commercial accommodation in Ontario (Table A-22). These take the form of motels, hotels, resorts, cottages, cabins and camps. Licenced hotels and motor hotels have by far the largest percentage of units of all the commercial accommodation types (36.04 percent). Motels and cottages are the two next largest categories, accounting for 25.62 percent and 23.25 percent respectively of accommodation type.

Figure A-17 outlines the distribution and nature of commercial establishment units in Ontario. Toronto and the Golden Horseshoe area contain the greatest number of year-round commercial accommodation units. Accommodation provision in the southwestern, central and northern portions of Ontario, excluding some of the major centres such as Thunder Bay, Sudbury, North Bay, Sault St. Marie and Windsor, is not dense and is mainly seasonal in nature. Exceptions to this are Wasaga Beach (on Georgian Bay) and Fort Frances in Northwestern Ontario, which have high concentrations of seasonal accommodation units. The main concentration of year-round, commercial

TABLE A-22

COMMERCIAL ACCOMMODATION IN ONTARIO:

NUMBER OF UNITS, 1974

TYPE OF ESTABLISHMENT	NUMBER OF UNITS PER TYPE OF ESTABLISHMENT	PERCENTAGE OF THE TOTAL NUMBER OF ESTABLISHMENTS
Hotel/motor Hotel (LLBO)	40,619	36.04
Hotel (not LLBO)	1,442	1.28
Motel	28,869	25.62
Resort	10,821	9.6
Cottage	26,205	23.25
Cabin	3,635	3.23
Other	1,103	.98
TOTAL	112,694	100.0%

NOTE: Number of units for "Hotel/Motor Hotel (LLBO)" is from the 1973 Accommodation Guide. The other types of establishments were licenced by The Ministry of Industry and Tourism in 1970.

SOURCE: Ministry of Industry and Tourism, Ontario Tourist Establishment Occupancy, November, 1974.

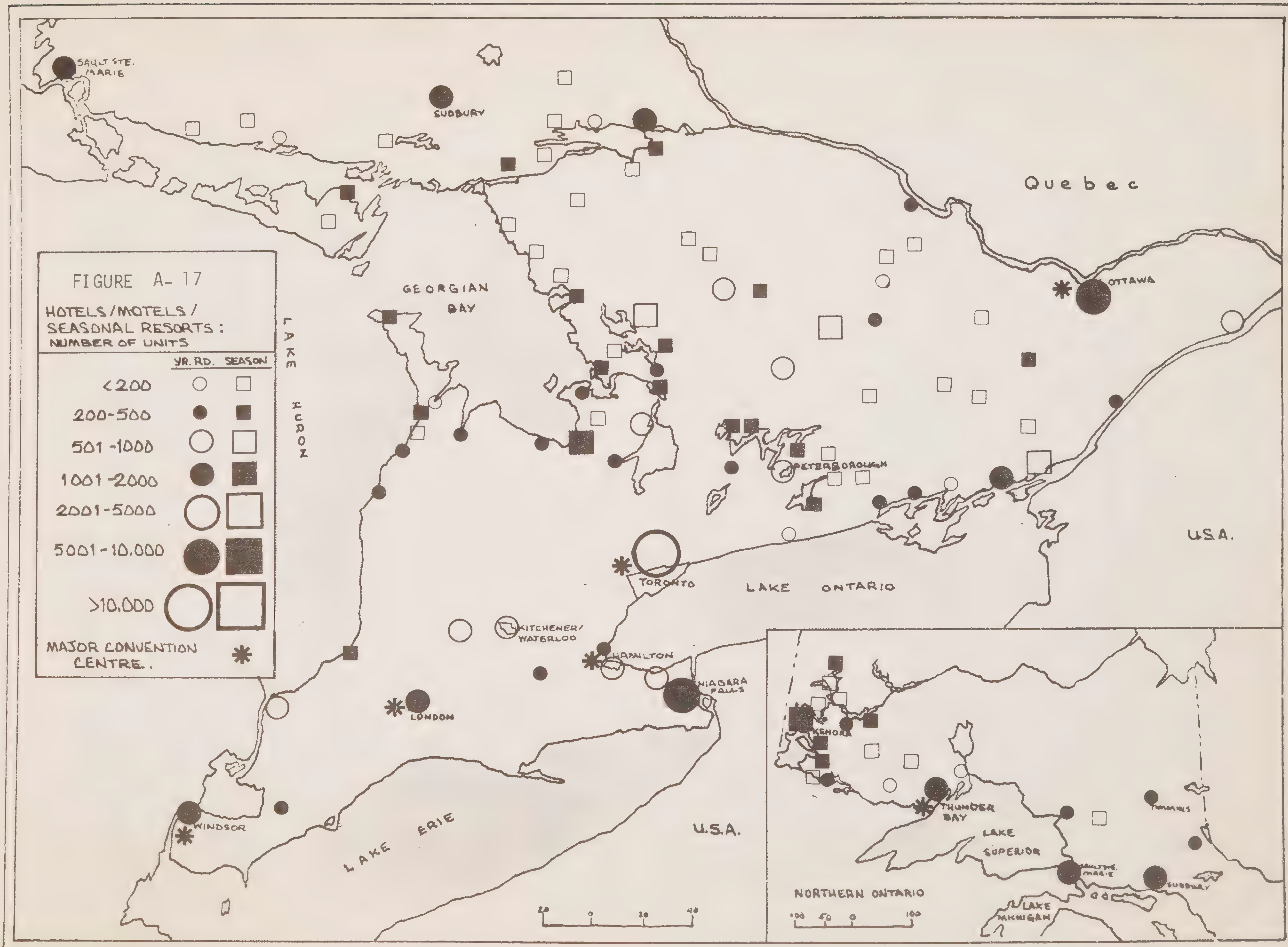


FIGURE A- 17
HOTELS/MOTELS/
SEASONAL RESORTS:
NUMBER OF UNITS
YR. RD.
SEASON
<200
200-500
501-1000
1001-2000
2001-5000
5001-10,000
>10,000
MAJOR CONVENTION CENTRE.
SAULT STE. MARIE
SUDBURY
Quebec
OTTAWA
GEORGIAN BAY
LAKE HURON
PETERBOROUGH
TORONTO
LAKE ONTARIO
U.S.A.
KITCHENER/ WATERLOO
HAMILTON
NIAGARA FALLS
LONDON
WINDSOR
LAKE ERIE
U.S.A.
20 0 20 40
KENORA
THUNDER BAY
LAKE SUPERIOR
TIMMINS
SAULT STE. MARIE
SUDBURY
LAKE MICHIGAN
NORTHERN ONTARIO
100 50 0 100

establishments in Eastern Ontario is around the Ottawa and Kingston areas. There is also a scattering of seasonal resort areas throughout Eastern Ontario.

It should be noted that large concentrations of commercial accommodation, operated on a year-round basis, are associated with major urban centres in Ontario, and therefore, are generally accessible to large number of people. Toronto, Niagara Falls, and to a lesser extent, Ottawa, are excellent examples of this. Toronto, Niagara Falls, Windsor and London are also highly accessible to a significant number of potential American visitors. Many of these cities also contain noted convention centres, which would necessitate a large number of commercial accommodation units. Concentrations of year-round accommodations also align themselves with areas with a significant cultural or attraction base, for instance, in the Golden Horseshoe and Toronto areas, around Ottawa, Sault Ste. Marie, and along the St. Lawrence River.

High concentrations of seasonal accommodation occur along major bodies of water (i.e., Georgian Bay, Lake Huron, Lake Simcoe, Lake of the Woods, and St. Lawrence River) which indicates the popularity of water-based recreational activities, such as swimming, boating and fishing. This type of accommodation also appears to be concentrated in areas where hunting and fishing are popular, for instance, in the Kenora and Dryden districts, around Lake Nipissing, and in portions of central Ontario, around Algonquin Park and in the Muskoka Lakes area.

ii) Convention Centres.--In addition to the provision of accommodation establishments for pleasure and commercial travellers in Ontario, the Province offers a host of facilities equipped to accommodate meetings and conventions of small and large groups of people. These convention facilities are in the form of hotels, inns and universities (located mainly in the larger urban centres) and resorts and lodges (situated in less populated areas of Ontario).

There are approximately one hundred and six hotels and inns and seventeen universities utilized as convention centres. The major convention facilities in Ontario are located in Toronto, Ottawa, London, Thunder Bay, Hamilton and Windsor. Niagara Falls, Sudbury, North Bay, Kitchener, Orillia, Peterborough, Sarnia and Sault Ste. Marie also play a significant role in the provision of such facilities (Ministry of Industry and Tourism, 1975, p. 5).

Nearly 75 percent of all requests for meeting and convention sites in

Ontario, received by the Ministry of Industry and Tourism's convention promotion staff, are for resort locations (Ministry of Industry and Tourism, 1975, p. 5). There are approximately 43 resorts located throughout the province, which cater to the meeting and convention trade and are members of the Association of Tourist Resorts of Ontario (Association of Tourist Resorts of Ontario, 1975).

iii) Campgrounds.--There are approximately 1,767 campgrounds containing a total of 110,255 individual and 92 group campsites. Private campgrounds (of which there are about 1,338) supply by far the largest number of campsites (81,786 or 74.18 percent of individual sites) with the next largest supply group being provincial parks (120 parks and 20,166 campsites or 18.3 percent of individual sites). Refer to Table A-23 for a description of the number of campgrounds and campsites by supplier in Ontario.

Campsites maintained by private operators, are concentrated around Niagara Falls and other parts of the Golden Horseshoe, along Lake Huron and Southern Georgian Bay. They are mainly associated with waterbodies and along highway routes in central and eastern Ontario. In the north, the major concentrations are around Sault Ste. Marie and Thunder Bay (Figure A-18).

Private campgrounds tend to be much more oriented to recreation facilities than either National or Provincial Parks. Some private campground operators provide such facilities as swimming pools, recreation halls, golf courses, mini-golf courses and children's playgrounds, or such facilities are located nearby. There appears to be less emphasis on the natural element in this type of camping experience.

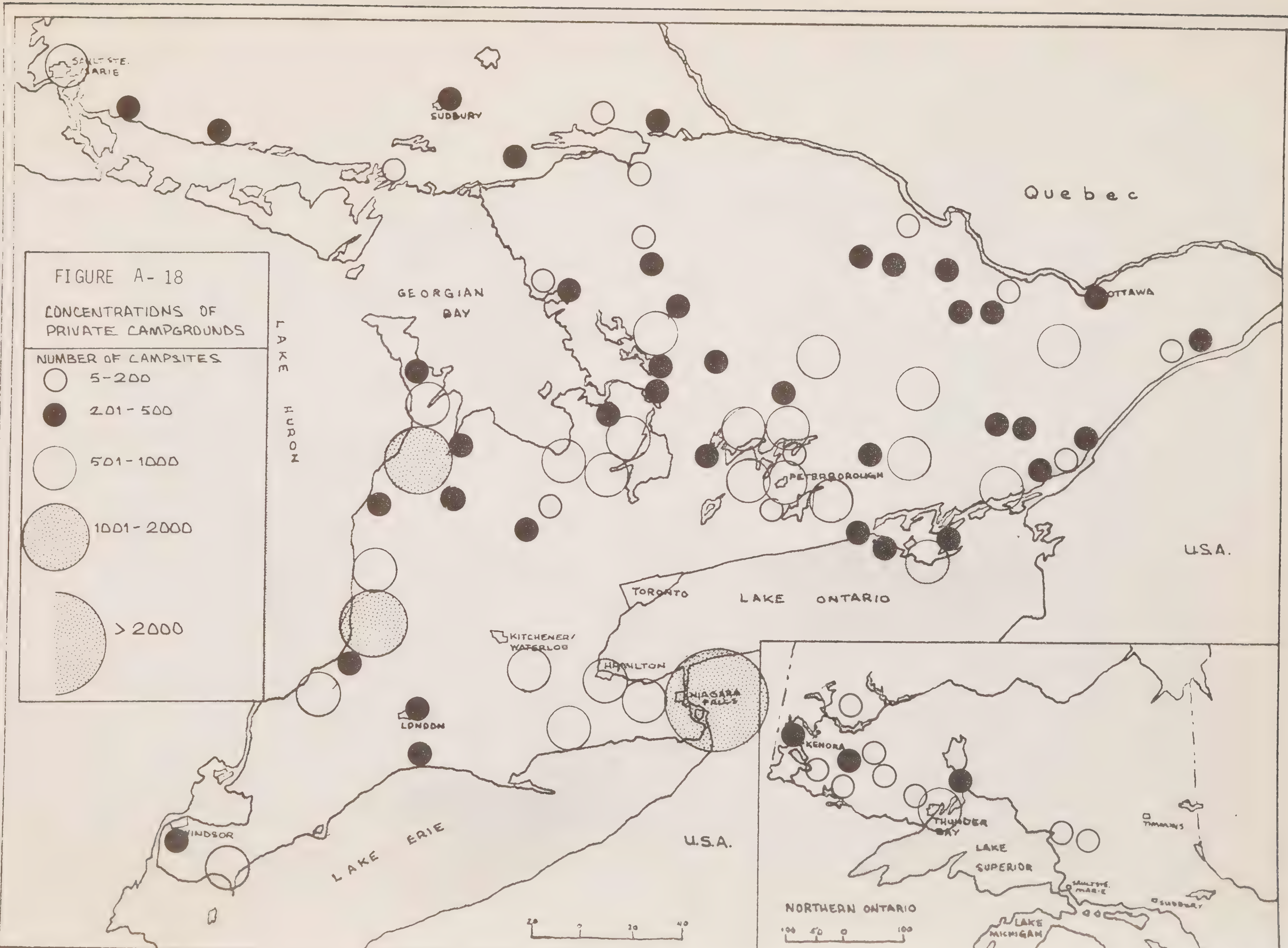
There are three national parks located in Ontario: St. Lawrence Islands National Park, Georgian Bay Islands National Park and Point Pelee National Park (Figure A-19). The first two are equipped with camping facilities, providing a total of approximately 150 campsites. Point Pelee National Park no longer offers camping facilities. A new national park is currently under development in Northwestern Ontario, called Pukaskwa Park. When completed, it should provide opportunities for wilderness hiking and a limited amount of organized camping.

In 1974 and 1975, surveys were conducted of 118 provincial parks

TABLE A -23

NUMBER OF CAMPGROUNDS AND CAMPSITES
BY SUPPLIER IN ONTARIO

TYPE OF PARK	NUMBER	NUMBER OF OF INDIVIDUAL CAMPSITES	% OF TOTAL OF INDIVIDUAL CAMPSITES	NUMBER OF GROUP CAMPSITES	% OF TOTAL OF GROUP CAMPSITES
National Parks	3 (one developed Pukaskwa)	150	.14		
Provincial Parks	120 (109 with sites)	20,166	18.3		
Conservation Areas	288 (63 with sites)	5,793	5.25	92	100
Commission Parks	18	2,360	2.14		
Private Campgrounds	1,338	81,768	74.18		
TOTAL	1,767	110,255	100.0%	92	100%



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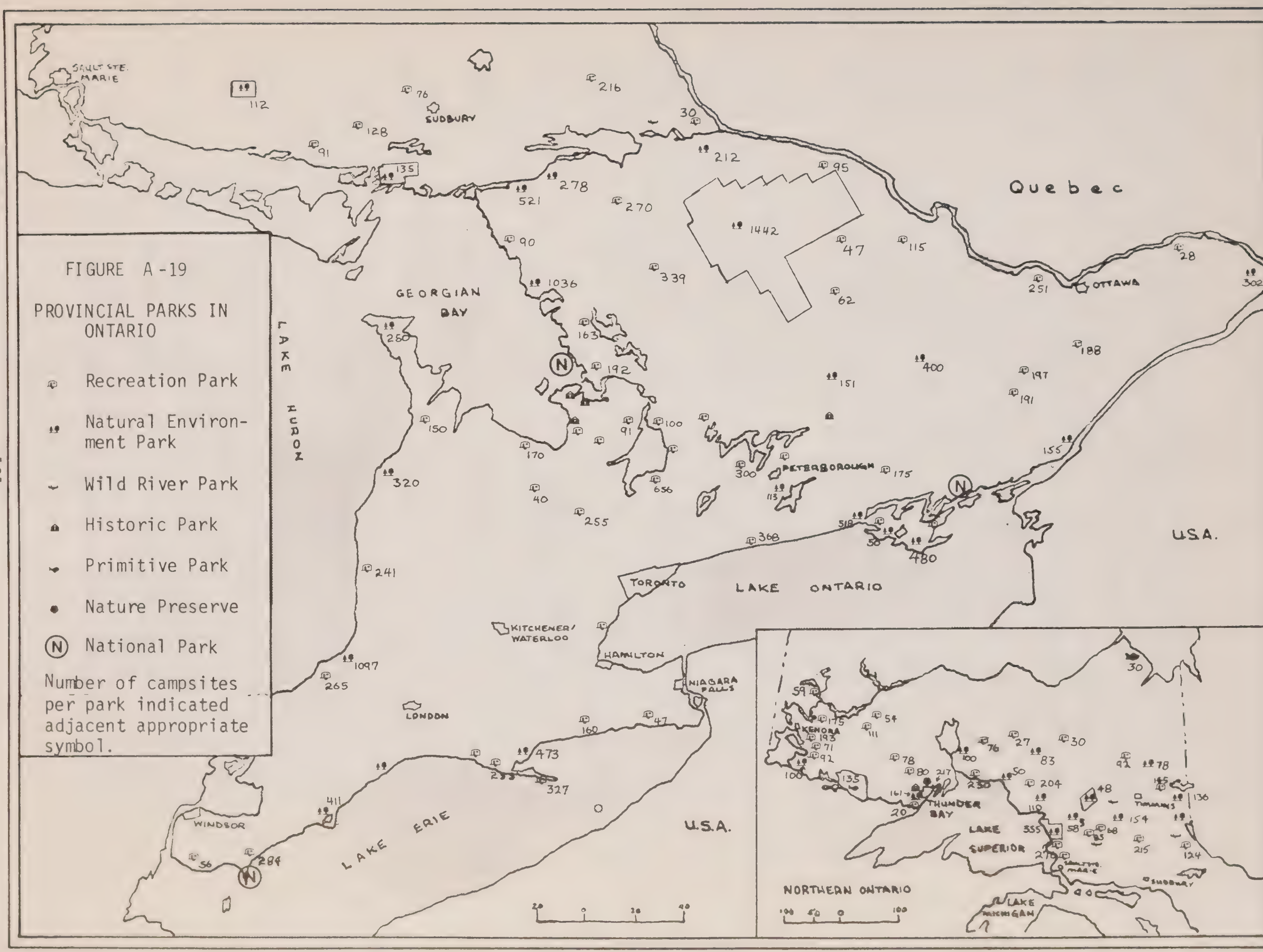

FIGURE A-19

PROVINCIAL PARKS IN ONTARIO

(117 in 1974). In 1975 the total acreage of provincial parks was 10,488,839 and included 20,166 developed campsites (Table A -24). During the years from 1968 to 1975, there was a substantial increase in agreage (6,725,399 acres) with the addition of 24 parks; during this period, the number of developed campsites increased only minimally by 2,874 sites.

Figure A - 19 indicates that in numerical terms, the provincial parks are fairly evenly distributed between Southern and Northern Ontario, with Southern Ontario having slightly more and those in Northern Ontario being larger in size. However, the parks are much more heavily concentrated in the south, whereas they are fairly dispersed in the north. With the exception of Polar Bear and Winisk Wild River Provincial Parks, which are the only two parks located in the far northern extremeties of the province, all are accessible by road.

Many of the provincial parks, with the possible exception of the historic parks, are closely aligned with bodies of water and other significant natural features which would seem to indicate the importance of the natural features and landscape in this type of camping experience and the importance of the recreational element, particularly water-oriented recreation (e.g., swimming, boating, fishing), in association with the camping experience.

The high incidence of Recreation and Natural Environment parks, as opposed to the extremely low numbers of Primitive parks, further emphasizes the opportunities available to provincial park users, who desire a recreational experience, in a semi-wilderness environment.

There are 288 Conservation Areas currently in operation in Ontario. Sixty-three of these maintain sites for camping, totalling 5,793 individual and 92 group campsites. The Conservation Areas, providing camping facilities, are heavily concentrated in the Southwestern portion of Ontario and around the Toronto area, with a few scattered throughout the southern portion of Central and Eastern Ontario (Figure A - 20.) There are no conservation areas, with campsites, in Northern or Northwestern Ontario. Camping is permitted on crown land in these areas.

iv) Second Residences.--Cottaging is a major form of recreation in Ontario. There are approximately 225,000 second residences in the province, of which about 87 percent are owned by Ontario residents. It is estimated that total recreation related to cottaging involves more than 50 million person

TABLE A-24

STATISTICAL COMPARISON OF PROVINCIAL

PARKS 1968 - 1975

Year	No. of Parks	Acreage	Developed Campsites
1968	96	3,763,440	17,298
1969	97	8,379,596	18,039
1970	108	10,236,909	18,296
1971	113	10,282,848	18,941
1972	115	10,363,312	19,983
1973	115	10,405,264	20,209
1974	117	10,466,668	20,036
1975	120	10,488,839	20,166

SOURCE: Ministry of Natural Resources, Ontario Provincial Parks: Statistical Report, 1974, p. 3., and Ontario Provincial Parks: Interim Statistical Report, 1975., Strategic Land Use Plan, 1975, p. 40.

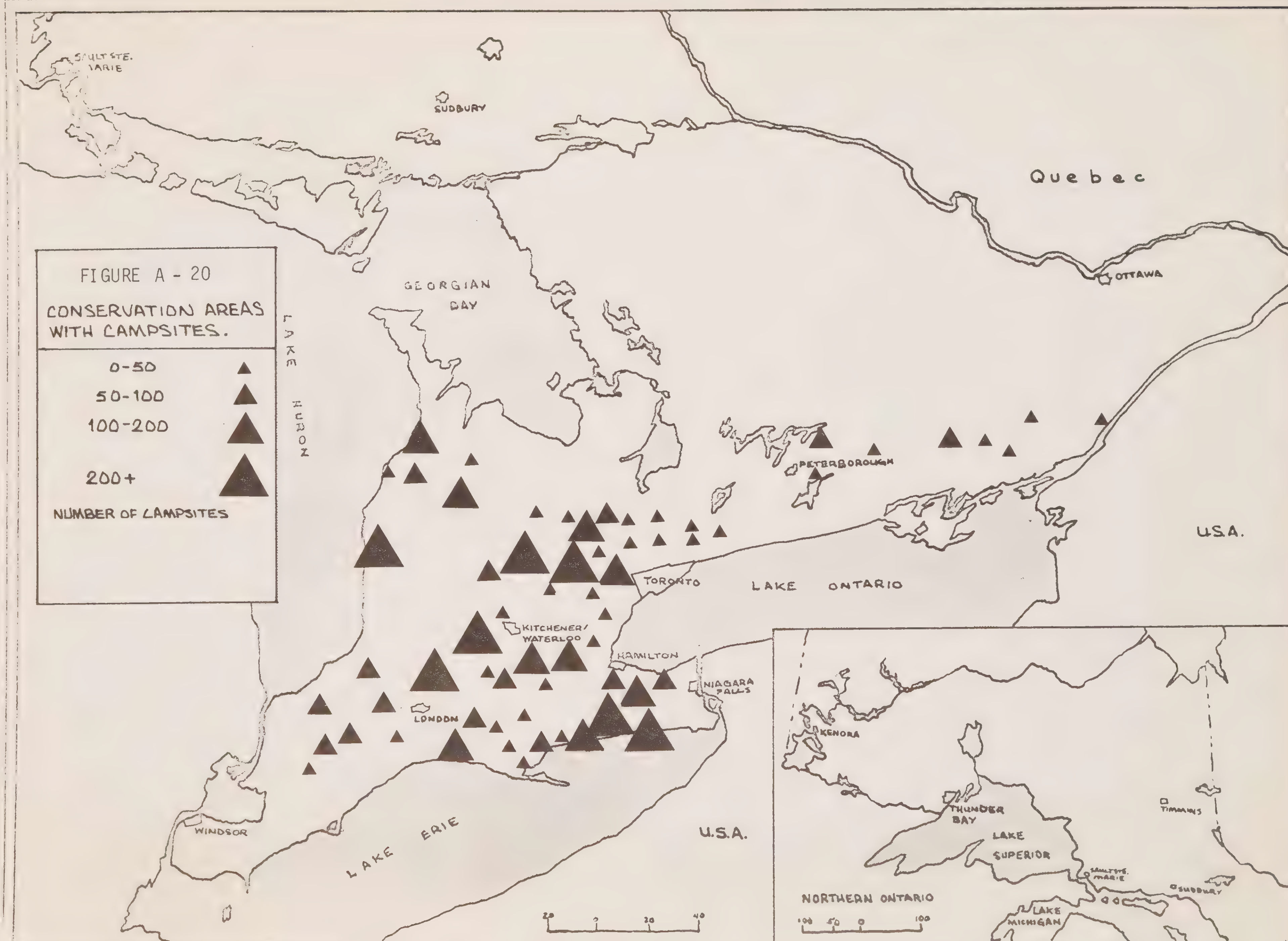

FIGURE A - 20
CONSERVATION AREAS WITH CAMPSITES.

days. Approximately 11 percent of the families in Ontario own a second residence. However, about 40 percent of Ontario families make use of a cottage by either renting or visiting (Ministry of Natural Resources, 1975, p. 53).

The Analysis of Ontario Cottage Survey, completed in 1968, examined the economic significance of second residences in Ontario. It was estimated that in 1967, the owners of second residences spent about $171 million or an average of about $855.00 per owner (Department of Tourism and Information, 1971, p. 11).

Cottaging represents a major tourism consideration for many areas in Ontario. The Ministry of Natural Resources (1975) estimated that annual expenditures for items such as taxes and services ranged from $1,000 to $2,000 per cottage.

Most second residence lots are made available by means of private developments and severances. Over the last decade, crown lots, which represent only 10 percent of the total lots, were made available at an average rate of about 1,000 per year (Ministry of Natural Resources, 1975, p. 53).

The Ontario Hydro Electric Power Commission defines "seasonal residence" as any dwelling or any non-productive farm, that is being used for only part of the year. Even if a second residence is used by the owner throughout the year, it would be considered a seasonal residence if the address was different from the owner's permanent address.

Table A-25 lists the number of seasonal residences with Ontario Hydro contracts for the years 1968 through 1973. This gives some indication of the number and yearly increase of second residences in Ontario. These totals, however, exclude those without electric power, and those having contracts with other hydro companies. If present trends continue, there may be in excess of 200,000 electrically supplied seasonal units by 1985. It is quite probable, however, that in view of energy issues and inflationary trends, this projection is optimistic. A comparison with cottage growth projections done in 1966 by the Department of Municipal Affairs illustrated that even in the years to 1971 there was significant change in the trends. The regions Peterborough-Haliburton-Victoria and Grey-Bruce were over predicted. The regions Muskoka-Parry Sound, Simcoe and York-Ontario were under predicted. The obvious conclusion to be drawn is that cottage building in

TABLE A -25

NUMBER OF SEASONAL RESIDENCES WITH
ONTARIO HYDRO CONTRACTS 1968 - 1973

YEAR	NUMBER OF SEASONAL RESIDENCES
1968	131,003
1969	136,694
1970	141,022
1971	145,830
1972	147,600
1973	153,392

Source: Ontario Hydro Electric Power Commission

Muskoka and Parry Sound is taking place much faster than was expected.

There are approximately 157,000 privately-owned second residences in Southern Ontario.* Cottaging is concentrated in the Precambrian Shield, around large inland lakes, and along the Great Lakes shoreline. Their general distribution is illustrated in Figure A-21.

There are approximately 22,500 second residences located in Northeastern Ontario. The predominant cottaging areas are located along the Highway 17 corridor. A high density of second homes is found in the area between Batchawana Bay and Massey and in most of the townships surrounding the shoreline of Lake Nipissing. There is another large area with a high density of private recreational dwellings in a broad area around Killarney Provincial Park, accessible from highways 17 and 69. The majority of the remaining areas of high cottage density are oriented to the large accessible lakes or lake clusters near urban centres (e.g., Lake Temagami, Remi Lake, Barbers Bay, Round Lake and Kenogami Lake).

Approximately 15,000 second homes are located in Northwestern Ontario. Seventy percent of these are owned by Ontario residents, and the other 30 percent by people living outside the Province. The pattern of cottage development differs significantly from the population distribution in the Region. Approximately 4.7 percent of the population in the western part of the region own cottages as compared with only 2.6 percent in the eastern portion where the majority of this region's population is located.

b. Use of Existing Accommodation Resources in Ontario

i) Commercial Accommodation.--Tables A-26 and A-27 summarize the occupancy rates for commercial accommodation establishments for January and July, for the years 1968, 1970 and 1972 to 1975. The figures were based on a sample of approximately 1,000 establishments in Ontario.

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*Americans own approximately 13 percent of the second residences and account for about 18 percent of the total related expenditure in Ontario, or about 37 million dollars. Non-resident ownership is concentrated along Lake Erie in Essex County and in the Haldimand-Norfolk-Niagara area (Ministry of Natural Resources, December, 1974, p. 139).

FIGURE A - 21

DISTRIBUTION OF COTTAGES (BY TOWNSHIP)

TABLE A-26

OCCUPANCY RATES FOR TYPES OF COMMERCIAL
ACCOMMODATION IN ONTARIO
JANUARY 1968-1975 (EXCLUDING 1969 AND 1971)

YEAR	AVERAGE PERCENTAGE OF AVAILABLE UNITS OCCUPIED FOR EACH TYPE OF ACCOMMODATION					
	HOTEL, MOTOR HOTEL (LLBO)*	HOTEL, MOTEL (NOT LLBO)	RESORT	COTTAGE/ CABIN	OTHER	TOTAL
1968	49	41	17	Not Available	54%	46%
1970	51	38	37		36	46
1972	51	42	19		63	47
1973	50	38	17		59	45
1974	47	39	22		49	44
1975	49	34	23		63	44

Source: Tourism Research Branch, Commercial Accommodation Establishment Occupancy, January 1975, (May, 1975).

* Licenced by the Liquor Licence Board of Ontario

TABLE A-27

OCCUPANCY RATES FOR TYPES OF COMMERCIAL ACCOMMODATION IN ONTARIO

JULY 1968-1975 (EXCLUDING 1969 AND 1971)

YEAR	AVERAGE PERCENTAGE OF AVAILABLE UNITS OCCUPIED FOR EACH TYPE OF ACCOMMODATION					
	HOTEL/MOTOR HOTEL (LLBO)*	HOTEL, MOTEL (NOT LLBO)	RESORT	COTTAGE/ CABIN	OTHER	TOTAL
1968	62	72	70	80	68	70
1970	70	74	61	77	49	71
1972	69	77	72	81	58	74
1973	68	74	60	82	50	71
1974	71	70	70	79	60	72
1975	71	75	64	76	63	72

Source: Tourism Research Branch, Commercial Accommodation Establishment Occupancy, July, 1975, (May, 1975).

*Licenced by the Liquor Licence Board of Ontario.

When comparing the January and July figures, the outstanding feature is the apparent seasonal nature of the use of commercial accommodation in Ontario. The occupancy rates decreased dramatically during the winter months and are fairly high during the summer months.

The total occupancy rates for the Province, for all types of establishments, during January 1975, was 44 percent, maintaining the same figure as the previous January. The category "Hotel, Motel" (without a liquor licence) experienced a minor decrease in occupancy from 39 percent to 34 percent from January 1974.

The occupancy rates in July, for all types of commercial accommodation establishments, remained the same through 1974 and 1975. The category "Hotels, Motels" (without a liquor licence), experienced a minor increase from 70 percent in 1974 to 75 percent in 1975, whereas "Resort" and "Cottage/Cabin" categories had slightly decreased occupancy rates.

During January, the categories "Other" and "Hotel, Motor Hotel" with a liquor licence maintained the highest occupancy rates through 1968 to 1975, whereas in July, the categories "cottage/cabin" and "Hotel, Motel" without a liquor licence had the highest rates.

Table A-28 outlines the occupancy rates for the various types of establishments, by the number of rental units. For the category "Hotels, Motor Hotels" with a liquor licence, the larger establishments (100 or more rental units) experienced a decline in occupancy rates from 76 percent to 73 percent (from 1974 to 1975). The smaller establishments, with 30-99 units and 29 or less rental units, maintained similar but lower rates through 1974 and 1975.

The occupancy rates for hotels and motels without a liquor licence and having 30-99 rental units declined from 81 percent down to 77 percent through the same time period; however, those with 29 units or less experienced increased occupancy rates from 67 percent up to 74 percent.

Resorts, with less than 30 rental units experienced declining occupancy rates, from 68 percent in 1974 to 58 percent in 1975. Resorts with 30-99 rental units increased their occupancy from 77 to 80 percent. Cottages with less than 30 units maintained the same level through 1974 and 1975.

The hotel occupancy rates in Toronto, Ottawa and other Ontario cities for the years 1974 and 1975, are compared in Table A-29. These figures

TABLE A-28

OCCUPANCY RATES FOR TYPE OF COMMERCIAL ACCOMMODATION
IN ONTARIO BY SIZE OF ESTABLISHMENT (1972-1975)

AVERAGE PERCENTAGE OF AVAILABLE UNITS OCCUPIED FOR EACH TYPE AND SIZE OF ACCOMMODATION						
NUMBER OF RENTAL UNITS PER ESTABLISHMENT	YEAR	HOTEL, MOTOR HOTEL (LLBO)	HOTEL, MOTEL (NOT LLBO)	RESORT	COTTAGE/CABIN	OTHER
100 or more	1972	72	Not Available			
	1973	72				
	1974	76				
	1975	73	75			
30-99	1972	69	85	75	91	N/A
	1973	67	82	63	90	"
	1974	68	81	77	85	"
	1975	69	77	80	N/A	"
29 or less	1972	66	72	71	78	58
	1973	60	70	58	77	50
	1974	63	67	68	74	60
	1975	64	74	58	76	63

Source: Tourism Research Branch, Ministry of Industry and Tourism, October 16, 1975.

indicate a decrease, in all cities surveyed, in the hotel occupancy rates over the last year.

TABLE A-29

HOTEL OCCUPANCY RATES FOR 1975 AND 1974

CITY	OCCUPANCY		PERCENTAGE OF INCREASE OR DECREASE
	1975	1974	
Toronto	68%	76%	-8
Ottawa	71%	73%	-2
Other Ontario	60%	64%	-4

Note: These figures do not include the month of December for 1975.

Source: Laventhol and Horwath Management Consultants, Trends of Business in Hotels, 1975.

ii) Public Campsites in Provincial Parks.--Several conclusions can be drawn from a review of park use information. Although overall visitation to provincial parks has decreased since 1971, there has been a general increase in the number of campers using the parks.

Those people who camp in provincial parks are mainly Ontario residents and a substantial number (about 25 percent) come from the United States. A large percentage of the campers are under 19 years of age. Slightly over half the people camping in provincial parks view the park as their final destination, while the remainder, record it only as a stopover point.

The largest percentage of day visitors to provincial parks are family groups, with groups of friends and couples next in importance. Over half of the day visitors are under 24 years of age, with the highest percentage under 14 years. A large number of visitors view the park as their main destination for a one day duration. However, over one-third of the day visitors to provincial parks utilize the park only as a recreation site during their trip. A more detailed discussion of provincial park use was

presented in Section 2 of this appendix.

iii) Use by Ontario Residents.--The Tourism and Outdoor Recreation Planning Study collected data through the Ontario Recreation Survey (Progress Report 2, January 1974) on type of accommodation used on their (Ontario residents) most recent overnight weekend and/or vacation trip.

Table A-30 summarizes accommodation used on weekend trips and Table A-31 summarizes accommodation used on vacation trips. This information is also summarized below:

Weekend trips:

a) home of a friend or relative was the most frequently used type of accommodation for weekend trips to Metropolitan Toronto - 81 percent (Metropolitan Toronto also had highest percentage of accommodation nights at hotel/motel - 15 percent);
b) half of all the weekend trip nights in the Georgian Bay area spent at a cottage, chalet or hobby farm - 50 percent; and
c) tent, tent trailer or pickup camper comprised 34 percent of accommodation use in weekend trips in Northwestern areas.

Vacation trips:

a) the most often used accommodation for vacation trips was a cottage, chalet, or hobby farm - 45 percent; and
b) two-thirds (67 percent) of the accommodation use on vacation trips to east Lake Ontario/Kingston-Peterborough was a cottage, chalet or hobby farm.

The T.O.R.P.S. survey also collected data on preferred weekend and vacation trips. Hotels and motels were preferred for weekend and vacation trips (refer to Table A-32). Additional information was collected about reasons for preferences in accommodation (see Table A-33 and Figure A-22). The main reason cited for preferring the use of a tent, tent trailer or pickup camper as an accommodation type is economy, followed by a desire for a natural environment. The reasons most often given for preferring hotel/motel usage on a weekend trip or vacation are accessibility and reliability.

TABLE A - 30

TYPE OF ACCOMMODATION USE* BY SECTION OF PROVINCE FOR WEEKEND TRIPS

(Column %)

DESTINATION

ACCOMMODATION TYPE	St. Lawrence and Ottawa	East Lake Ontario Kingston-Peterborough	West Lake Ontario Urban and Rural	Metro Toronto	South Western Ontario Urban and Rural	Georgian Bay	North Eastern Urban and Rural	North Western Urban and Rural	Number of Cases	Percent of Accommodation Use By Type
Hotel/Motel	14	5	12	15	5	5	7	5	618	7
Home of Friend or Relative	44	27	54	81	53	18	37	32	3190	38
Tent, Tent Trailer, Pickup Camper	14	15	19	<1	17	19	22	34	1414	17
Cottage, Chalet, Hobby Farm	25	47	6	1	15	50	24	27	2452	30
Resort Lodge	0	1	1	0	0	1	<1	0	49	<1
Travel Trailer, Mobile Home	1	4	5	<1	8	5	4	2	380	5
Other	2	1	3	3	2	2	5	<1	208	2
Number of Cases	613	1179	1015	613	1371	2391	907	222	8311	
Percent of Accommodation Use	7	14	12	7	17	29	11	3		

* Accommodation Use implies percent of all nights on which the accommodation was used for the specified trips within the time period 3 months prior to the day of interview.

Source: Tourism and Outdoor Recreation Planning Study, Ontario Recreation Survey: Progress Report No. 2, January, 1974.

TABLE A.-31

TYPE OF ACCOMMODATION USE BY SECTION OF PROVINCE FOR VACATION TRIPS

(Column %)

DESTINATION

ACCOMMODATION TYPE	St. Lawrence and Ottawa	East Lake Ontario Kingston-Peterborough	West Lake Ontario Urban and Rural	Metro Toronto	South Western Ontario Urban and Rural	Georgian Bay	North Eastern Urban and Rural	North Western Urban and Rural	Number of Cases	Percent of Accommodation Use By Type
Hotel/Motel	14	2	9	10	5	2	8	15	603	6
Home of Friend or Relative	33	9	40	80	31	9	25	12	2135	21
Tent, Tent Trailer Pickup Camper	11	11	9	3	9	16	30	22	1490	15
Cottage, Chalet, Hobby Farm	33	67	25	0	43	55	27	42	4530	45
Resort Lodge	0	1	3	0	0	3	2	2	159	2
Travel Trailer, Mobile Home	4	4	8	0	7	7	4	5	552	5
Other	5	6	6	7	5	8	4	2	574	6
Number of Cases	1017	1885	758	317	1311	2927	1443	385	10043	
Percent of Accommodation Use	10	19	8	3	13	29	14	4		

Source: Tourism and Outdoor Recreation Planning Study, Ontario Recreation Survey: Progress Report No. 2, January, 1974.

TABLE A -32

PREFERRED ACCOMMODATION* BY TYPE FOR WEEKEND AND VACATION TRIPS

(Column %)

Accommodation Type	Weekend Trips	Vacation Trips
Hotel/Motel	31	47
Home of Friend or Relative	19	20
Tent, Tent Trailer, Pickup Camper	17	10
Cottage, Chalet, Hobby Farm	12	3
Resort Lodge	3	2
Travel Trailer, Mobile Home	2	2
Other	3	9
Unspecified	13	7
Sample Size	5222	5210

* "Preferred Accommodation" refers to accommodation that would be used on most preferred trip during next 5 years.

Source: Tourism and Outdoor Recreation Planning Study, Ontario Recreation Survey Progress Report No. 2, January, 1974.

TABLE A-33

REASONS FOR PREFERRED ACCOMMODATION CHOICE ON MOST PREFERRED VACATION TRIP

(Column %)

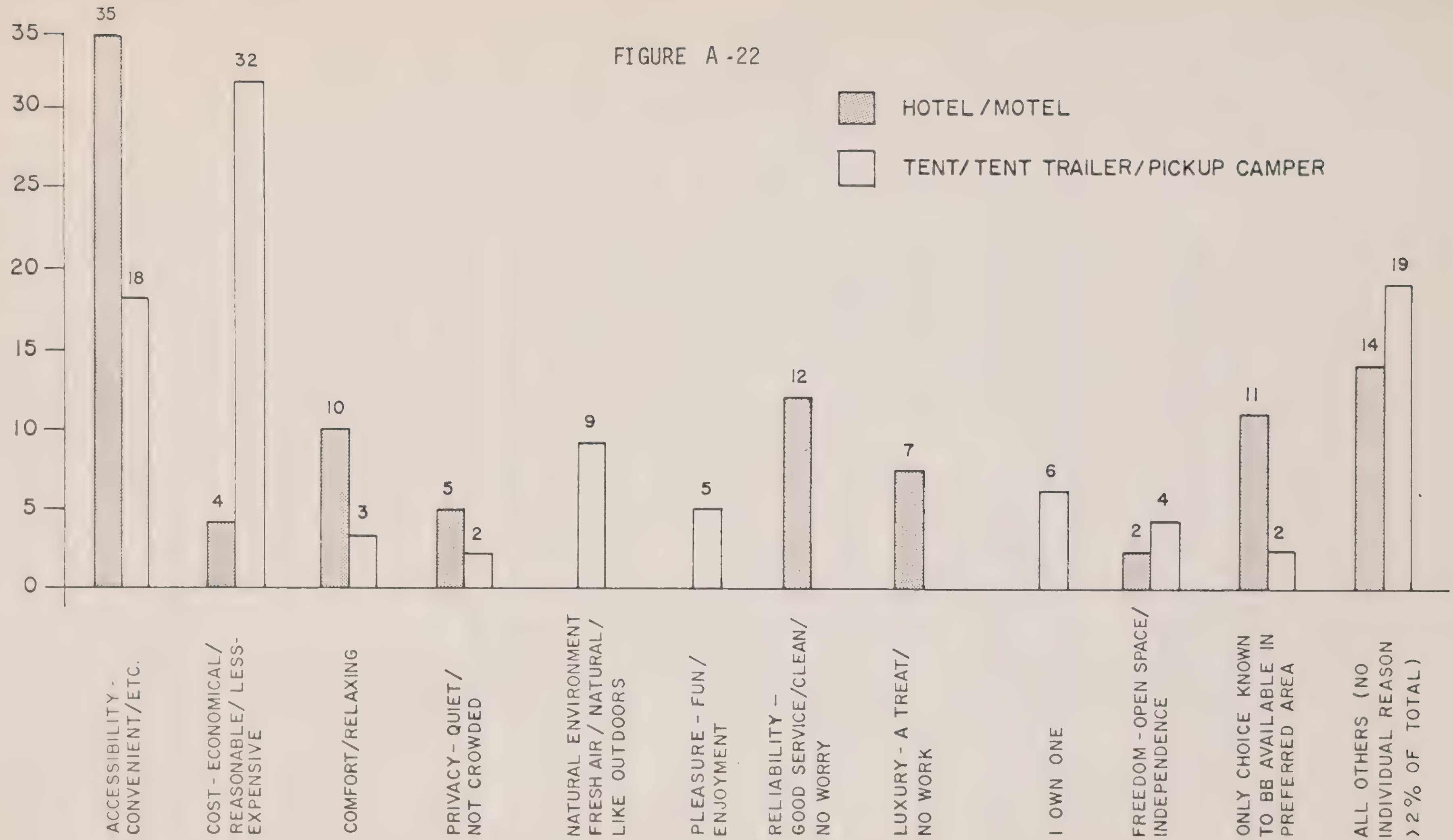
ACCOMMODATION TYPE

REASON FOR CHOICE	Hotel/Motel	Home of Friend/Relative	Tent, Tent Trailer Pickup Camper	Cottage, Chalet Hobby Farm	Resort Lodge	Travel Trailer Mobile Home	Other
Accessibility	35.0	10.0	18.0	12.0	21.0	20.0	19.0
Economical Cost	4.0	23.0	32.0	13.0	3.0	27.0	25.0
Comfort	10.0	4.0	3.0	13.0	9.0	8.0	4.0
Privacy	5.0		2.0	15.0	4.0	2.0	3.0
Natural Environment			9.0	8.0	5.0	4.0	2.0
Pleasure		1.0	5.0	1.0	5.0	2.0	3.0
Reliable	12.0	2.0		5.0	8.0	2.0	4.0
Visit Friend/ Relative		51.0		3.0		1.0	5.0
Luxury	7.0			2.0	5.0		2.0
Variety	1.0		1.0	1.0	2.0		3.0
Social Reasons	2.0	3.0	1.0		15.0		12.0
Own It			6.0	4.0		9.0	
Freedom	2.0		4.0	6.0	4.0	4.0	3.0
Mobility	1.0		9.0			16.0	4.0
Only Choice Available	11.0	3.0	2.0	4.0	5.0		6.0
Associated Activity	2.0		2.0	4.0	8.0		1.0
No Particular Reason	4.0	2.0	5.0	8.0	5.0	4.0	4.0
Other	2.0						
Number of Cases	3484	1367	904	249	131	219	690

NOTE: Values less than 1% have been omitted

Source: Tourism and Outdoor Recreation Planning Study, Ontario Recreation Survey Progress Report No. 2, January, 1974.

FIGURE A-22



REASONS GIVEN FOR CHOOSING HOTEL/MOTEL VERSUS TENT, TENT TRAILER OR PICKUP CAMPER AS PREFERRED ACCOMMODATION ON PREFERRED VACATION TRIP

Source: Tourism and Outdoor Recreation Planning Study, Ontario Recreation Survey Progress Report No. 2, January, 1974.

Use by Other Canadian Visitors.--The largest percentage (57) of other Canadian visitors to Ontario stayed at the home of friends or relatives (refer to Table A-34). The next most frequently used types of accomodations were motel (16.9 percent), campground or trailer park (11.1 percent), and hotel (5.5 percent), followed closely by private cottage or vacation home (4.7 percent). It should be noted that these statistics might vary quite drastically during different times of the year.

Use by United States Visitors Travelling By Automobile To Ontario (July, 1975).--The type of accommodation used by the United States automobile parties staying one or more nights in Ontario is summarized in the following three points and in Table A-35.

The largest number of United States parties visiting Ontario and staying one or more nights, stayed in motels (26.9 percent). The next most frequently used type of accommodation were the homes of friends and relatives (23.5 percent) followed by trailer parks/campsites (12.6 percent) and motor hotels. In terms of actual accommodation usage measured by volume of party-nights, the most heavily used were homes of friends and relatives (21.9 percent) and private cottages (21 percent). Next in volume of party-nights were motels (14.3 percent), followed by trailer parks/campsites (11.3 percent) and rented cabins/cottages (10.4 percent).

Accommodation usage by yearly quarter and by type is shown in Table A-36. Some seasonal variation was evident in the use of all types of accommodation. Large seasonal fluctuations were evident in the relative importance of personal cottage, home of friends and relatives, trailer park/campsite within each season. In the summer quarter, personal cottage accounted for 22.7 percent of the United States automobile party nights. This was followed by home of friends and relatives, representing 17.4 percent of the party nights and trailer park/campsite representing 16 percent.

Use of personal cottage accounted for 27.1 percent of the party nights in the fall quarter; home of friends and relatives for 25.9 percent and motel for 15.6 percent. Trail park/campsite represented only 1.1 percent of the party nights in this quarter.

In the winter quarter, home of friends and relatives (49.7 percent of the party nights), motel (17.8 percent) and motor hotel (9.1 percent) appeared to be the most popular forms of accommodation. Finally, in the spring, the home of friends and relatives accounted for 26.3 percent of

TABLE A-34

ACCOMMODATION USE BY OTHER CANADIANS
ON THEIR LONGEST VACATION, 3RD QUARTER OF 1974

TYPE OF ACCOMMODATION	NUMBER OF TRAVELLERS TO ONTARIO	PERCENTAGE UTILIZING EACH ACCOMMODATION FORM
Hotel	19,000	5.5
Motel	58,000	16.9
Campground or Trailer Park	38,000	11.1
Commercial Cabin or Cottage	4,000	1.2
Home of Friends and Relatives	195,000	57.0
Private Cottage or Vacation Home	16,000	4.7
Other	10,000	2.9
Not Reported	2,000	.6
TOTAL	342,000	100.0%

*Actual figures must be viewed with caution.

Source: Calculations based on data from Statistics Canada - Travel Survey 1974 - Canadian visitors to Ontario during 3rd Quarter of 1974.

TABLE A-35

SUMMARY OF ACCOMMODATION USAGE BY UNITED STATES VISITORS TRAVELLING BY AUTOMOBILE TO ONTARIO, 1973/74

TYPE OF ACCOMMODATION	NUMBER OF PARTIES	PERCENT	AVERAGE LENGTH OF STAY	NUMBER OF PARTY NIGHTS	PERCENT
Motel	712,900	26.9	1.84	1,159,700	14.3
Home of Friends and Relatives	621,000	23.5	3.23	1,770,700	21.9
Trailer Park/ Campsite	332,595	12.6	3.27	913,600	11.3
Motor Hotel	281,000	10.6	1.76	437,400	5.4
Own Cottage	245,000	9.3	7.84	1,703,400	21.0
Hotel	175,300	6.6	2.34	359,800	4.4
Rented Cabins/ Cottage	109,604	4.1	8.72	844,300	10.4
Resort Lodge	56,000	2.1	5.31	254,200	3.1
Tourist Outfitter	40,100	1.5	5.38	181,400	2.2
Hostel	10,357	.4	4.23	23,900	0.3
Other	62,443	2.4	8.67	451,500	5.6
TOTAL	2,232,400*	100.0	3.63	8,099,900	100.0

*Number of parties by type of accommodation used in Ontario adds up to more than the total due to multiple mentions.

Source: Ministry of Industry and Tourism, U.S. Automobile Exit Study (U.S. Automobile Visitor to Ontario 1973/74), July, 1975.

TABLE A -36

SEASONAL BREAKDOWN OF PARTY-NIGHTS SPENT IN EACH ACCOMMODATION TYPE BY UNITED STATES VISITORS TRAVELLING BY AUTOMOBILE TO ONTARIO, 1973/74

TYPE OF ACCOMMODATION	SUMMER 1973	PERCENT	FALL 1973	PERCENT	WINTER 1974	PERCENT	SPRING 1974	PERCENT	YEAR TOTAL 1973/74	PERCENT
Home of Friends, Relatives	894,300	17.4	328,500	25.9	214,400	49.7	333,500	26.3	1,770,700	21.9
Own Cottage	1,169,500	22.7	343,100	27.1	28,900	6.7	161,900	12.8	1,703,400	21.0
Hotel	155,500	3.0	72,600	5.7	28,900	6.7	102,800	8.1	359,800	4.4
Motor Hotel	229,600	4.6	48,600	3.8	39,200	9.1	120,000	9.5	437,400	5.4
Motel	604,800	11.8	198,500	15.6	76,900	17.8	279,500	22.0	1,159,700	14.3
Resort, Lodge	210,800	4.1	15,600	1.2	8,000	1.8	19,800	1.6	254,200	3.1
Tourist Outfitter	140,800	2.7	20,300	1.7	-	-	20,300	1.6	181,400	2.2
Rented Cabins/ Cottage	692,500	13.5	84,700	6.7	-	-	67,100	5.3	844,300	10.4
Hostel	23,600	.5	-	-	300	.1	-	-	23,900	0.3
Trailer park/ Campsite	819,600	16.0	14,000	1.1	-	-	80,000	6.3	913,600	11.3
Other	192,200	3.7	141,800	11.2	35,000	8.1	82,500	6.5	451,500	5.6
Number of U.S. Automobile Party Nights	5,133,200	100.0	1,267,700	100.0	431,600	100.0	1,267,400	100.0	8,099,900	
Number of Parties Staying One or More Nights	1,204,100		307,300		163,700		557,300		2,232,400	
Average Number of Nights per Party that stayed One or More Nights in Ontario	4.26		4.13		2.64		2.27		3.63	

Source: U.S. Automobile Exit Study. (U.S. Automobile Visitors to Ontario 1973/74), Tourism Research Branch, Ontario Ministry of Industry and Tourism, (July, 1975).

the nights spent in Ontario by United States automobile parties, motels for 22 percent and personal cottage for 12.8 percent.

Hostels, tourist outfitters and resort/lodge represented consistently low percentages of the total party nights in all quarters.

c. Future of Accommodation

Year round occupancy rates for hotels, motels and campgrounds indicate that there are no overall shortages of accommodation. There are, however, shortages of certain types of accommodation at certain times and in certain places. Most deficiences appear to be related to recreation, rather than business or travel. As well, there is little data available describing quality of accommodation and no rating system has been devised to compare data if it were available. Currently, user complaint information constitutes the bulk of information about quality of accommodation in Ontario.

The Progress Reports of the Ontario Recreation Survey reported on current types of accommodation used and preferred types of accommodation. This information, considered in conjunction with the projected future use of accommodations presented in the 1972 Canadian Tourism Facts Book (Table A-37), demonstrates that the popularity of hotels, motels and resorts is increasing.

Expected decreases in the per capita dollars available for tourism have definite implications for the types of hotels and motels which will be desired and the types of services and facilities required. The following is a list of the most significant of those implications:

i) less money available for accommodation expense;
ii) demand for camping still apparent;
iii) increasing use of accommodation for conferences;
iv) increased use of both inexpensive accommodation and of 'grand' hotels;
v) increased use of condominiums, self service, hospitality types of accommodation; and
vi) demand for a major conference centre to enable Ontario to compete for the conference market.

The variety of tourism experiences and the demand for simple, low cost, seasonal facilities is expected to grow. There will also be an in-

TABLE A-37

PROJECTIONS OF TOTAL DEMAND FOR ACCOMMODATION
BY CANADIANS & NON-RESIDENTS
1970, 1975, 1980.

	VACATION TRIPS		PERSONAL TRIPS		BUSINESS TRIPS		TOTALS	
	Total Person Nights		Total Person Nights		Total Person Nights		Total Person Nights	
	Hotel, Motel & Others	Camp Sites	Hotel, Motel & Others	Camp Sites	Hotel, Motel & Others	Camp Sites	Hotel, Motel & Others	Camp Sites
1970								
by Canadians	33,430,339	10,720,727	21,134,252	3,950,327	16,459,711	822,986	71,024,302	15,494,040
by Non-Residents	46,893,887	10,306,755	1,102,768	242,376	4,516,096	992,588	52,512,751	11,541,719
Total	80,324,226	21,027,482	22,237,020	4,192,703	20,975,807	1,815,574	123,537,053	27,035,759
1975								
by Canadians	42,201,945	13,511,808	30,465,509	5,694,487	23,727,045	1,186,353	96,394,499	20,392,648
by Non-Residents	54,362,866	11,948,354	1,278,409	280,980	5,235,395	1,150,681	60,876,670	13,380,015
Total	96,564,811	25,460,162	31,743,918	5,975,467	28,962,440	2,337,034	157,271,169	33,772,663
1980								
by Canadians	52,597,003	16,783,265	42,833,764	8,006,311	33,359,644	1,667,983	128,790,411	26,457,559
by Non-Residents	63,021,462	13,851,417	1,482,028	325,733	6,069,257	1,333,955	70,572,747	15,511,105
Total	115,618,465	30,634,682	44,315,792	8,332,044	39,428,901	3,001,938	199,363,158	41,968,664

Source: Projected by the Travel Industry Branch, Canadian Government Office of Tourism. The Canadian Tourism Facts Book, 1972.

creased demand for resorts and catered vacations, due to the growing desire for a restful, catered holiday.

Income will be more evenly distributed, and more and more people will be in the middle class (L. J. D'Amore and Associates Ltd., p. 3). This will result in an increased demand for services that are economical; therefore, there will be growing usage of family recreation vehicles as accommodation (e.g., camping), and the demand will increase for family camps and recreation farms.

The total amount of leisure time available will increase and will occur in larger time blocks (L. J. D'Amore and Associates Ltd., p. 5). This will result in a growing demand for longer weekend tours and as a result, an increased demand also for a variety of accommodation types in fairly close proximity to major population centres.

By 1985, people will place more emphasis on environmental values then at the present time. Therefore, there will be increased clustering of man-made attractions and multi-dimensional vacation spots to concentrate impact. This will result in an increased demand for a variety of accommodation types within or near attraction clusters.

Seasonality has always been a major factor affecting accommodation usage, and the demand for certain types of accommodation. With increased vacationing during the shoulder periods and off-seasons, there will be a corresponding increased demand for motels, hotels and other forms of accommodation, which are suitable for winter vacationing (e.g., winterized cabins, resorts, etc.). Due to the hazards of winter driving, these accommodation types should be located close to high population centres and transportation corridors so that mass transit can provide an alternative form of transportation to the destination area.

Whether or not the demand for second residences will increase in the years to come is subject to a great deal of controversy. Some of the factors positively affecting future demand are:

i) an increased desire to get away from the urban environment, resulting in a trend towards second homes in the country;

ii) changes in patterns of the work week or school year, resulting in a drop in the weekend traffic leaving the city (this should encourage a greater demand for cottages);

iii) increased number of people from the baby boom era reaching the

age at which the majority of cottage purchases are made; and

iv) the increasingly prohibitive cost of home ownership in the large urban centres of Ontario is currently attracting young families to investing in less expensive cottage property.

Some of the factors negatively affecting future demand for cottages are:

i) increased popularity of camping and trailering;

ii) increased trend toward remote vacations (i.e., vacations in other countries), rather than cottage vacations;

iii) changing family patterns (i.e., postponement of having children) resulting in a desire not to be tied down by a second home, and increased usage of commercial accommodation for travel;

iv) stringent controls by government, in future years, over presently undeveloped crown land, resulting in a decreased supply of cottage lots; and

v) dramatically increasing cost of cottage land, particularly in Southern Ontario (Sources: Department of Tourism and Information, Analysis of Ontario Cottage Survey, No. 55, 1971 and Ministry of Natural Resources, Strategic Land Use Plan, February 10, 1975).

Indications are that the private sector will continue to provide most of the future supply of cottage lots. Crown land lots will partially satisfy the demand of Ontario residents, for cottaging opportunities, once public recreation requirements are satisfied and provision is made to protect the quality of the natural environment. Crown land cottaging lots will be made available primarily in Northwestern Ontario due to the accessibility of relatively large acreages of suitable land. Because of the pressures on the supply of land in Southern, and to a lesser extend Northeastern Ontario, crown land will be provided more for public, rather than private, recreation purposes in these areas.

With regard to crown land lots, the Ministry of Natural Resources's overall policy guidelines state that:

i) lots will be made available by lease only;

ii) lots should be leased only if they conform to a local land use plan, where all other uses have been considered (in preparing local plans, constraints to cottage development, as recommended by the Interministry Committee on Lake Development, should be

applied); and

iii) all costs of planning, administering and developing the cottage lots must be recovered by the lessee.

The general intent of this policy is to make lots available to Ontario residents; availability of lots for non-residents is still under consideration.

Due to the increased pressures in the supply of land and lake shoreline, there will be a growing demand for new forms of cottaging. As a result, there will be a tendency toward cluster development, condominiums or even apartment units on or with access to lake shorelines. Winterization of cottages, particularly those that are located in proximity to urban centres, will become increasingly popular. In addition, there may be a trend toward the use of houseboats, cruisers and large sailboats in the place of cottages for recreation "homes".

5. Information Services

"The greatest variable in tourism, is the human element. It is important to recognize that...what is most relevant in the environment is not what is objectively there, but what is perceived " (Gunn, 1972, p. 108). Man-made, cultural and environmental features become tourism resources only when they are perceived as such. The finest physical facilities can be provided but if visitors find them unappealing, misunderstand them, have difficulty in locating them or feel unwelcome, the investment is of small value. The image that the prospective tourist has of a destination area, consequently, must be of as great a concern as the resource base which supports his activities.

There are two levels of image evolution. The "organic image," is derived by each person "from a long history of nontouristic-directed communication"; in other words, an assimilation of impressions coming from life experiences (Gunn, 1972, p. 110). At the second level, the image of tourism "derives from a conscious effort of development, promotion, advertising and publicity--an induced image" (Gunn, 1972, p. 111). It is, at the second level, that images can be manipulated and that hospitality resources (i.e., information/direction services) play an influential role in image creation. Hospitality resources, furthermore, are crucial in ensuring that visitors have satisfying experiences. Information/direction services impart to the tourist, knowledge about attractions/events and facilities and assist them in locating and understanding these features so that they might be enjoyed.

a. Existing Situation

Numerous public and private individuals and agencies supply information/direction services in the form of advertising books, pamphlets, guides, information centres, travel counsellors, travelogs and word-of-mouth.

At the provincial level, the Ministry of Industry and Tourism, has determined how much or how little the travellers know about Ontario and its tourism resources. The main task of the marketing experts is to impart information about lifestyle, culture, attractions, events,

entertainment and support facilities (transportation, accommodation, etc.) in Ontario, Canada, the United States, the United Kingdom, Europe and Japan.

A variety of means such as broadcasts, newspapers, travel trade and convention services, publications and customers services are incorporated to deliver these information/direction services to the markets.

i) Broadcast.--Television reaches 97 percent of North Americans for an average of 3½ hours each day. The television commercials related to Ontario tourism "focus primarily on 9 major markets in Ontario, Winnipeg, Montreal and 11 markets in the United States, all within 150 miles of the Canadian border. To a lesser extent summertime television advertising also occurs in the United States between 150 and 350 miles from the border. The film library has a host of titles on Ontario's travel attractions which are constantly being shown to television, community and theatre audiences in target markets throughout the world--Canada, U.S.A., United Kingdom, France, West Germany, Holland and, this year, Japan" (Ministry of Industry & Tourism, 1975).

Radio broadcasts are selectively bought during spring/summer and fall advertising periods in order to support 'impulse' travel decisions. These focus strictly on the domestic market.

ii) Newspapers.--"Daily newspapers support the television image campaign. As a media, newspapers provide a high reach (84 percent) of adults per issue and make it possible to present timely and detailed information on specific attractions, events and package tours" (Ministry of Industry and Tourism, 1975). This form of advertising emphasizes access to Ontario, the variety of experiences that are offered, plus information and knowledge about Ontario. This type of information/direction service is currently aimed at domestic and United States markets. The accent appears to be on the spring/summer season.

iii) Travel Trade and Convention Services.--The consumer advertising campaigns in North America are supplemented by an extensive program directed toward the travel trade, convention and meeting planners. Insertions, featured regularly in the Canadian Travel Courier and the American publications of Travel Weekly, Travel Agent and Travelage West, are created to point out Ontario's many and varied vacation possibilities and range of visitor attractions. "Travel agents and group travel

organizers are informed of the specific tour programs available for sale, and of the specialized services and merchandising aids at their disposal. Offers of assistance and support for travel agents in the areas of literature, display materials, co-operative promotion, itinerary planning and travel information pertaining to commissionable accommodations, sightseeing and tour program development are highlighted" (Ministry of Industry & Tourism, 1975). In addition, an invitation is extended to meeting planners and convention organizers to discuss their requirements with the appropriate staff within the Division of Tourism. The Division of Tourism staff also offers "co-operation in the dissemination of meeting leads to suitable Convention Bureaux, Chambers of Commerce, resorts and individual members of Ontario's accommodation sector" (Ministry of Industry & Tourism, 1975).

To extend an awareness of Ontario as a desirable vacation destination into the rapidly growing overseas markets, a series of advertisements are placed in the United Kingdom and Western European travel trade press. "Overseas advertising promotion serves as well to inform travel agents of the ready availability of tour planning assistance and accurate travel information provided by specialized tourism staff in the Ministry's foreign office locations. This facility contributes immeasurably to the continued growth of the off-shore visitor market" (Ministry of Industry & Tourism, 1975).

Specialized reference and promotional material has been introduced to serve the requirements of the travel industry and convention planners.

> The 'Travel Agents Manual', widely distributed at home and abroad, provides travel agents with the accurate information necessary in planning tours and vacation travel itineraries, and identifies those facilities, tour products, and services which can be purchased on the customary travel agency commission.
>
> The 'Convention Guide', featuring quality meeting facilities in Ontario, is designed to inform corporate and association meeting planners regarding the range and quality of Ontario's excellent facilities.
>
> The publication, 'Ontario/Canada Holidays' has been developed to provide basic travel information and highlights of Ontario's major attractions and events for the prospective visitor from abroad. Printed in English, French, German and Japanese this promotional piece is widely distributed through the travel industry in overseas markets.

'Ontario/Canada Tours' contains a compendium of package tours available from Ontario operators. Consumer-oriented, it serves to encourage prospective visitors to utilize the services of travel agents and generate additional sales of Ontario tour products.

A selection of seven 'Tour Shells' for use by travel agents facilitates their preparation of Ontario tour programs and assures a wide range of available package products for the visitor (Ministry of Industry & Tourism, 1975).

iv) Publications.--The Ontario Ministry of Industry and Tourism publishes a number of books and brochures that are designed to inform travellers about Ontario and to assist them when they arrive in the province. These tourism publications are distributed to visitors through the Ministry's Travel Information Centres, recognized travel centres and travel associations within the Province. Outside Ontario, they are available through offices of the Canadian Government Office of Tourism, auto clubs, and travel agencies. French editions of certain publications are also available.

The publications include:

a) The Gold Book--which describes Ontario's heritages, present appeals and the future;

b) Traveller's Encyclopaedia--which describes 12 varied areas of Ontario, points of interest, attractions, events and suggested sightseeing tours;

c) Event and Attractions--a brochure highlighting major attractions and events and 4 seasonal booklets detailing events and dates;

d) Camping, Boating, Sportsman, Accommodation and Winter Adventures--five books which provide detailed information about these facilities across the province; and

e) The Travel Counsellor's Directory--which gives particulars about Ontario's attractions and events to assist the counsellor in aiding the vacationer.

v) Customer Service.--The Ministry's Customer Sales and Service Section in Toronto can be contacted by mail or telephone, for detailed travel counselling.

In addition to providing the enquirer with Ministry publications, prospective travellers' names are sent to Ontario associations and operators via the Daily Enquiry List. Operators wishing

further information may contact this section. The Ministry operates 18 Travel Information Centres to provide travellers with detailed information on the Province's facilities. These centres supply the visitor with Ministry literature in addition to that provided by regional travel associations, Chambers of Commerce and operators. In addition, 18 service centres on the Macdonald-Cartier freeway offer travel counselling during July and August. Operators and associations may also forward brochures to these locations for distribution (Ministry of Industry & Tourism, 1975).

The centres at Barrie, Cornwall, Fort Frances, Hill Island, Niagara Falls, Sarnia, Sault Ste. Marie, St. Catherines and Windsor (Windsor-Detroit Tunnel) are open all year. Those at Fort Erie, Hawkesbury, Kenora, Lancaster, Pigeon River, Pointe Fortune, Prescott, Rainey River and Windsor (Ambassador Bridge exit) are only open from mid-May to mid-September.

vi) Travel Associations.--

In April, 1974 the Ontario Travel Association Program was introduced to encourage regional and local tourism marketing, research and development through a system of 12 regional travel associations. OTAP enables the Ministry, through the Tourism Marketing Branch and the small Business-Operations Division, to support each of the travel associations with a $30,000 administrative grant and a $45,000 cost-sharing provision.

The administrative grant contributes to the expense of employing a full-time manager and staff as required by OTAP, and the cost-sharing provision assists the travel associations in marketing and development activities.

The cost-sharing is determined on the basis of a 90% contribution from the Ministry for approved programs in Northern Ontario, a 75% contribution in Eastern and Central Ontario, and a 50% contribution in the rest of Ontario (Ministry of Industry & Tourism, 1975)

It is necessary to have adequate hospitality services, even at local levels, where much of the information and direction is derived from personal contact with the local residents. At this level, it is important that residents perceive the visitor favourably. Positive attitudes towards the visitor can be created through good programs of public information. "Public relations and publicity programmed to convince local citizens of the importance of tourism are helpful" (McIntosh, April 1972, p. 130).

It is equally important for all persons who have direct contact with visitors (e.g., store clerks, gas station attendants, hotel clerks,

waiters, waitresses) to be courteous and informed about the location of important local points of interest.

Organized groups that provide information/direction services at the local level include chambers of commerce, small groups of tourist operators, tour organizers and, occasionally, clubs (e.g., ethnic clubs, sportsman clubs). The services, which are provided to assist visitors in finding their way around the area and to inform them about local attractions, events and activities, may be supplied in the form of brochures, local maps, information booths, advertising in local newspapers and broadcasts over local and regional radio networks.

b. Future Trends in Hospitality Resources

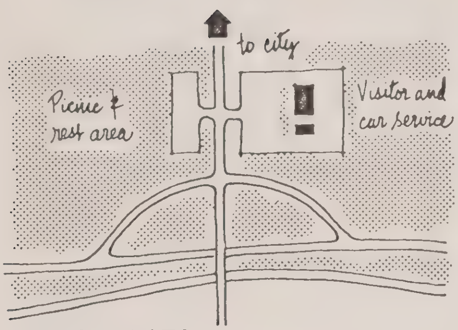
Demand is increasing and will probably continue to increase for more specialized receptive/directive information about tourism opportunities and access to them. This is due mainly to the general increase in levels of education.

Currently, promotional publications generally handle attractions, events, activities, accommodation and transportation separately; documents should be produced that provide information about all these components for any one destination in one booklet.

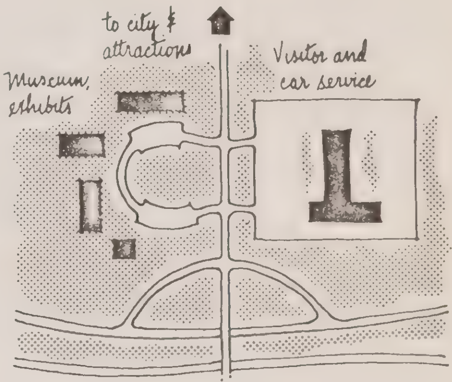
A type of hospitality resource that is presently not readily available in Ontario but should be considered for the future is what Gunn (1972) refers to as a "hospitality plaza". This facility differs from the more well-known service plaza or centre (located at an exit to a community) in that it is located "within the heart of the attraction destination region" and at provincial boundaries. This is where the plaza can function best to provide extensive information and guidance services.

> Published guides, maps, directories, and promotional tourist literature would be available. In addition, trained counselors would advise the traveler on all matters pertaining to the attractions, services, and facilities available from this exit. Ideally they would be linked with a central computer system which could provide minute-by-minute guidance on accommodations, weather, hours of admission to featured attractions, entrance charges, and other significant information about distant locations.

A modification of this type of plaza would include a major interpretation area. Within and outside buildings, exhibits would show the points of interest available from this location. Models, samples of minerals, and illustrated dioramas might induce the traveler to investigate the things to see and do that are reachable from this exit (Gunn, 1972, pp. 94 and 95).



SERVICE PLAZA



HOSPITALITY PLAZA

Source: Gunn, 1972, p. 94.

Better co-ordination of information and direction services should be developed among local, regional and provincial levels, and between the public and private sectors to decrease duplication and increase comprehensiveness.

As a final suggestion, training programs should be instigated to better equip persons who deal directly with tourists at the local level to provide more adequate information and directions.

6. Transportation

a. Importance of Transportation to Tourism

The definition of tourism (of which there are many) relates directly to distance and time away from home - tourism is, thus, inseparable from and dependent on travel. Essential as the attractions, services and facilities are, they are of little value unless transportation and access are provided to and from them. In fact, tourism may exist without man-made attractions, without entertainment centres or even without motels and hotels for those individuals who are nature lovers or urban escapists; but even for these types of tourists, tourism is inconceivable without transport.

Transportation plays an important role in tourism in two ways:

i) it provides the vehicle for the population to travel, and

ii) it makes specific areas/regions accessible to the traveller.

The historical development of transportation modes influenced the location of tourism development. The vacation areas in Ontario at the turn of the century which were serviced by rail, today have been engulfed by expanded urban centres. The automobile and the building of new and better highways opened up many new hinterlands and provided a wide range of destinations. Air transport has broadened the tourists' potential choice even further. A weekend trip to any North American city becomes a possibility, while the choice for a vacation trip is virtually limitless.

b. Modes of Travel

The factors, time, distance and cost play an important role in the selection of an attraction/destination. These factors also influence the selection of the type of mode of transport. The disposable time available for a recreational/tourism experience may influence the distance travelled and may also determine the type of mode to be used. For any trip, a percentage of the costs incurred will be consumed in travel expenses, thus discretionary income will play a role in determining type of mode. Distance to a destination is probably the most significant factor influencing

choice of mode of transportation. As the distance from origin to destination increases, a shift from private automobile to air transportation is apparent with travel by rail lying between the two.

The other important components which influence the selection of mode of travel are convenience and accessibility. The private automobile for short distance trips is the most convenient means of travel because it provides a lenient departure time and allows side trips en route. There are areas in the province (i.e., remote areas of Northern Ontario) which are only accessible by air.

The number and type of people attracted to a country/province is largely dependent on the variety of attractions or tourist experiences offered. The variety of transportation alternatives may also be an important consideration, as variety in modes of travel available may be an attraction in itself. Transportation modes/services hence do not only provide for accessibility to a destination, but also can contribute to the total travel experience.

Many studies investigating travel patterns have assembled information pertaining to mode of travel. Practically every market group to Ontario,with the exception of the overseas visitor,uses the private automobile to the largest degree (refer to Tables A-38, A-39 and A-40). It is expected that there will be a shift from the private automobile to other modes with the projected increase in cost of fuel and the decrease in speed limits on Ontario. It is anticipated, however, that the shift to other modes will be relatively insignificant and that the private automobile will continue to be used by the majority of recreational/tourist travellers (source: Ministry of Transportation and Communication, Ontario Provincial Government). In turn, there is evidence that there will be a shift away from the large automobile to the smaller, more economical models, and distance travelled may be reduced.

TABLE A-38

MAIN MODE OF TRAVEL BY ONTARIO
RESIDENTS IN ONTARIO

MODE*	NUMBER IN SAMPLE	PERCENTAGE
Auto	124,670	84.5
Plane	5,921	4.01
Train	2,102	1.42
Bus	4,546	3.08
Boat	573	.38
Motor Camper	4,493	3.04
Other	5,232	3.54

Source: Canadian Annual Vacation Patterns Survey 1974.

Note: * More than 1 mode of travel may have been recorded for each person-trip.

Mode of travel for 3 most recent vacation trips only.

TABLE A-39

UNITED STATES TRAVELLERS TO ONTARIO
BY MODE OF TRANSPORTATION

MODE	NUMBER IN SAMPLE	PERCENTAGE
Auto	3,705,642	87
Plane	85,087	2
Train	1,405	.03
Bus	171,835	4
Boat	212,144	5
Other	59,942	1
TOTAL	4,236,055	100

Source: Statistics Canada, August 1975.

TABLE A-40

MAIN MODE OF TRANSPORTATION BY OTHER
CANADIAN RESIDENTS TO ONTARIO

MODE*	NUMBER IN SAMPLE	PERCENTAGE
Auto	19,452	47.9
Plane	14,715	36.28
Train	3,468	8.5
Bus	1,932	4.76
Boat	64	.15
Motor Camper	644	1.58
Other	274	.67

Source: Canadian Annual Vacation Patterns Survey 1974.
Mode of Travel for 3 Most Recent Vacation Trips.

*More than 1 mode of travel was recorded for each person trip.

i) Automobile Travel and Related Infrastructure.--Auto travel is the predominant means of transportation into and within the province of Ontario.

TABLE A -41

AUTO TRAVEL TO AND WITHIN ONTARIO

ORIGIN	% OF TRAVEL BY AUTO	SOURCE
Ontario	84.5	Canadian Annual Vacation Pattern Survey (1974).
United States	87	Statistics Canada (1975).
Other Canadians	47.9	Canadian Annual Vacation Pattern Survey (1974).

The Province is characterized by generally good quality roads. The major land points of entry to the province are well serviced by good roads, as illustrated in Figure A-23.

For planning and administrative purposes, the provincial highways in Ontario have been classified by the Ministry of Transportation and Communication into three major groups.

Arterial -A highway primarily for long range trips on a continuous route.

Collector -A highway distributing traffic from arterial highways to local roads.

Local -A highway mainly serving short distance trips and providing access to abutting property.

In southern Ontario 'arterial' roads connect the major population centres. The lake shorelines and provincial boundaries are well serviced by these roads. The county, township and provincial highways in the southern portion of the Province enable accessibility to all areas on relatively good quality roads. Northern Ontario is characterized by similar road development which follows the shorelines and connects population centres. Unlike the south, northern Ontario has little or no development off the provincial highway system. Highway development generally has an east-west orientation which may serve to promote uninterrupted driving rather than encouraging the traveller to stop and enjoy the area. Travel by automobile is limited in northern Ontario, partly due to the lack of road development. There are few roads north of the 50^{o} line of latitude, leaving the vast majority of northern Ontario inaccessible by automobile.

Highway development is mostly occurring in southern Ontario where there are ever-increasing traffic demands to be met. Planned activity in southern Ontario is primarily the upgrading of 2 lane highways to 4 lane divided highways connecting the major centres.

Proposed road development in northern Ontario is largely limited to 2 lane paved highways which fall under the 'collector' highway category. The Ministry of Transportation and Communications' long range proposed highway development places increasing emphasis on northern Ontario.*

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*For specific highway developments, contact the Ontario Ministry of Transportation and Communications.

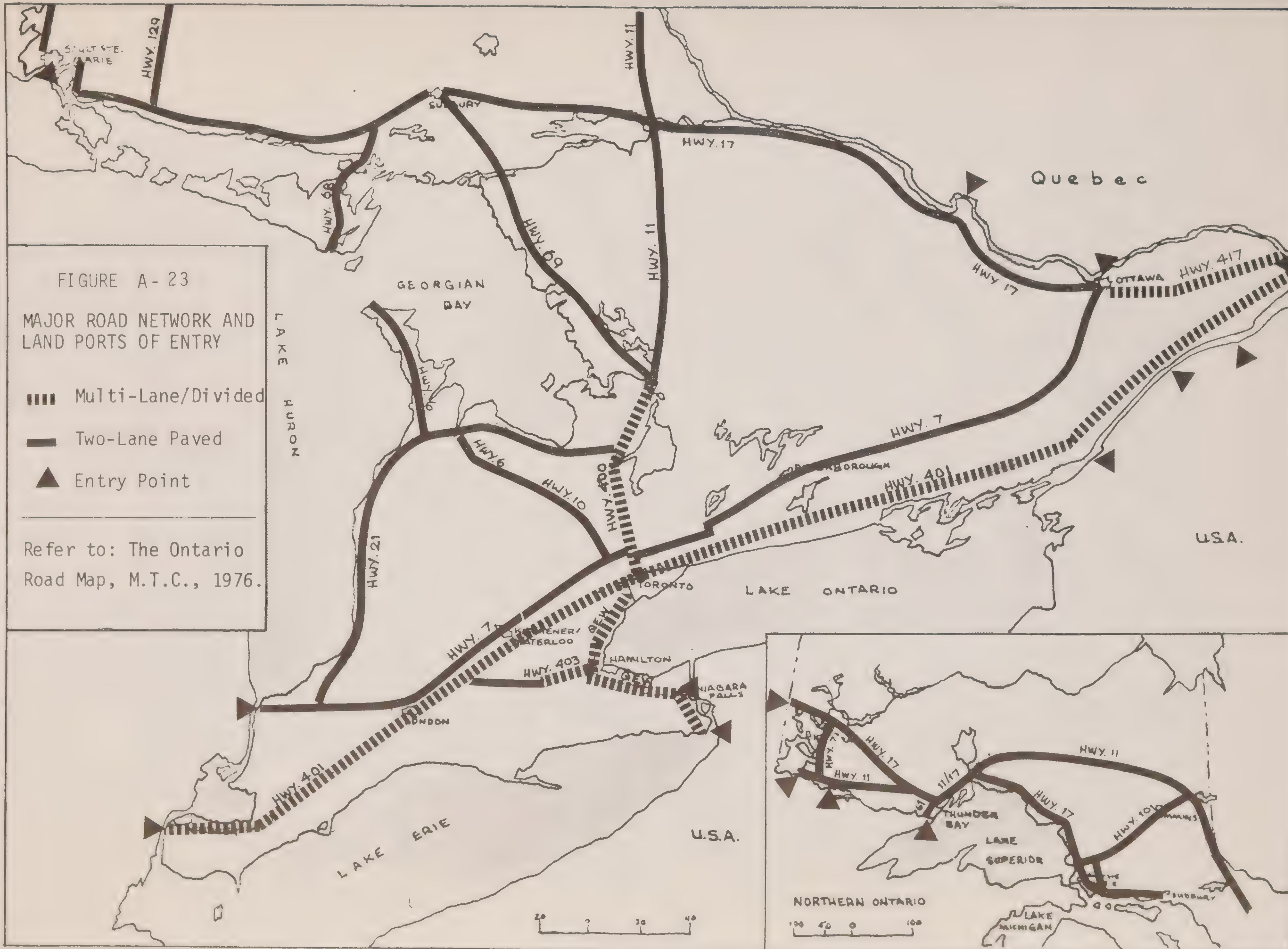


FIGURE A-23

MAJOR ROAD NETWORK AND LAND PORTS OF ENTRY

Multi-Lane/Divided
Two-Lane Paved
Entry Point

Refer to: The Ontario Road Map, M.T.C., 1976.

Very little data is available on the number of tourist/recreational vehicles on Ontario highways. Figure A-24 was prepared to give an indication of traffic volumes on selected Provincial highways during the summer months. This map illustrates that automobile traffic is heaviest on the four lane divided highways linking major urban centres and major recreation areas, and the majority of recreational/tourist traffic is experienced in the southern portion of the Province.

A review of the 1974 Permanent Counting Stations Annual Report showed that on highways in Northern Ontario an increase of up to 50% or more was encountered during the summer months in comparison to the winter months. Although the increase was not as great, a substantial increase was also noted on most of the Southern Ontario highways during the summer months (May to September). Throughout the Province the days in the months with peaking volumes tend to be Friday, Sunday or Monday.

It is of interest to note the degree to which non-resident visitors are penetrating into the Province and to identify circular routes that non-residents may be using. Figures A—25 illustrates that most U.S. residents travelling by car do not venture out of the area of their point of entry. Circular movements through the Province appear to be from Windsor to Niagara Falls, likely along Highway 401, and from Lansdowne/Prescott/Cornwall to Niagara Falls, again along Highway 401. Other circular routes apparent are from Sault Ste. Marie to Fort Frances, from Sault Ste. Marie to Lansdowne/Prescott/Cornwall and from Sault Ste. Marie to Niagara/Fort Erie or Windsor/Sarnia.

Important also to the automobile traveller are the auxiliary services found along the highways such as gasoline stations, roadside eating facilities, roadside parks and picnic facilities, scenic turnoffs, auto repair and service facilities and marked points of interest within easy access of the road. All these services are needed for successful auto tourism. The number and spacing of essential services depend on the nature of the area.

Service nodes have been specifically developed to serve the automobile traveller along Highways 401 and 400 and, to some degree, along Highway 7 from Peterborough to Ottawa. These service nodes contain gasoline

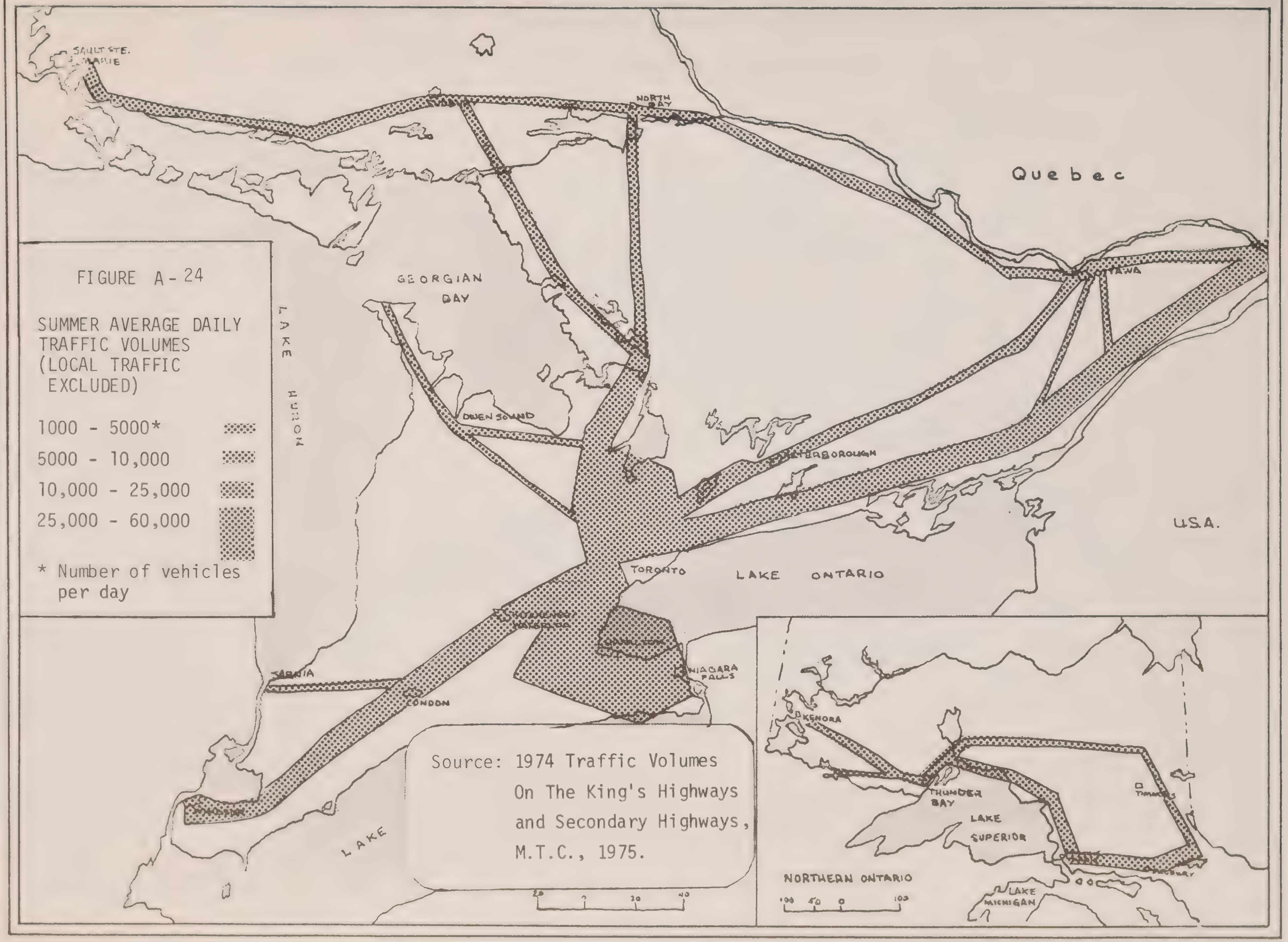


FIGURE A-24

SUMMER AVERAGE DAILY TRAFFIC VOLUMES (LOCAL TRAFFIC EXCLUDED)

1000 - 5000*
5000 - 10,000
10,000 - 25,000
25,000 - 60,000

* Number of vehicles per day

Source: 1974 Traffic Volumes On The King's Highways and Secondary Highways, M.T.C., 1975.

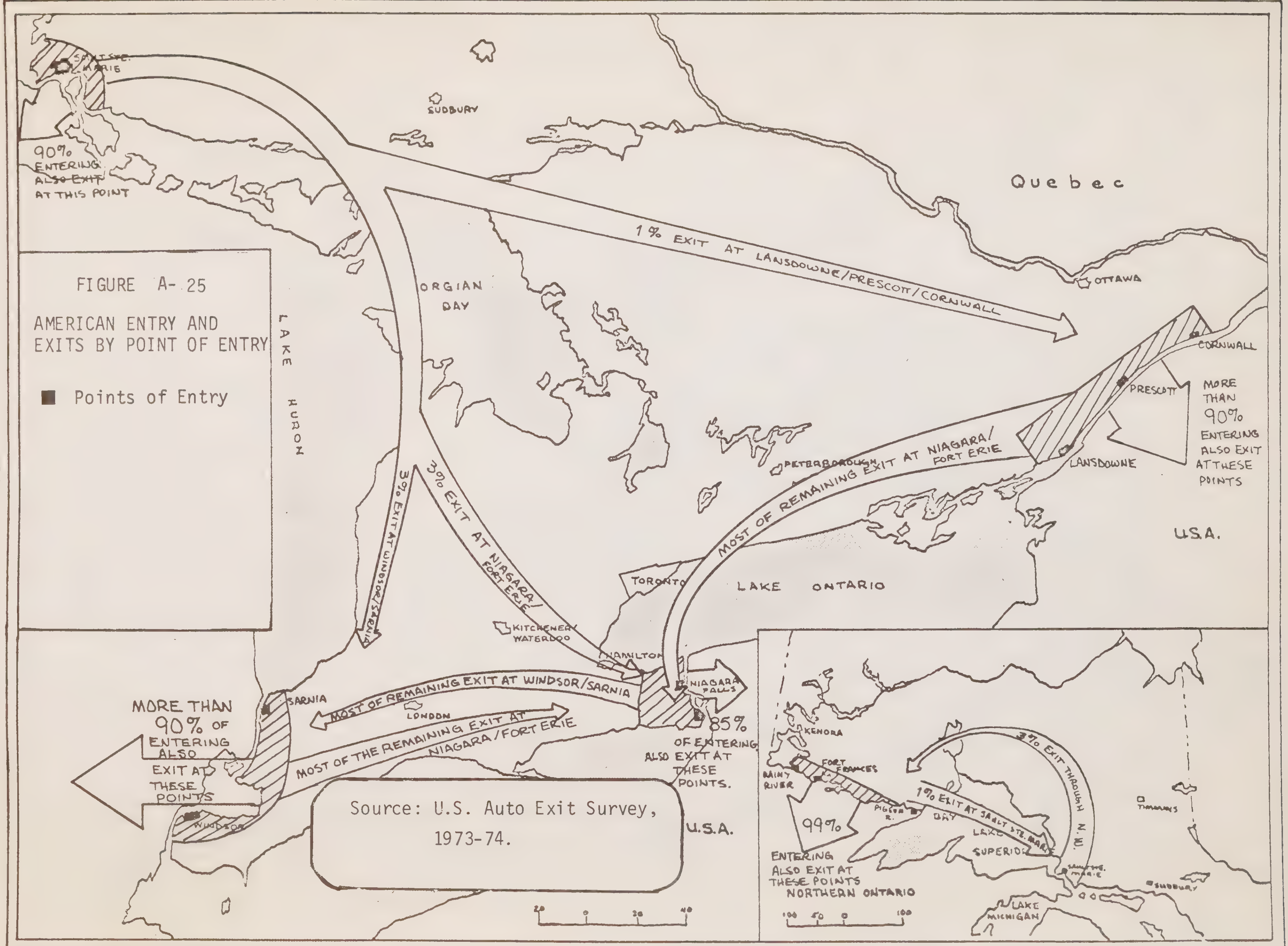


FIGURE A-25

AMERICAN ENTRY AND EXITS BY POINT OF ENTRY

■ Points of Entry

Source: U.S. Auto Exit Survey, 1973-74.

stations, auto repair and service facilities, restaurants and, quite often, picnic facilities. Many of these service nodes are open 24 hours a day and operate year round.

In Southern Ontario, because of the population base, many of these auxiliary services are available along most of the highways. However, off the highways discussed above, the services are less predictable because they close earlier and are not clustered, but scattered along the route.

In Northern Ontario these auxiliary services are not as readily available. Long stretches between the population centres lack these auxiliary service nodes. The lack of services in this area of the Province has resulted in travellers stopping on the side of the highways to picnic, deposit their waste and camp overnight. Responding to this problem, the Ministry of Natural Resources has recently developed picnic/campground sites roughly ¼ to ½ mile off the highways.

The designation and signing of a number of roads as scenic routes is yet another means of helping travellers to gain the maximum enjoyment from their trips. While most roads in Ontario pass through some scenic areas, those classified as scenic routes transverse landscapes of exceptional natural beauty and historic content. The Heritage Highways, for example, is the outcome of a cooperative project between the Ontario and Quebec governments (see Figure A-26). The route was chosen for its historic importance and scenic attractiveness. This route and the others (the Bluewater, Voyageur and Frontier Routes) were designated as scenic highways by the Ministry of Industry and Tourism in cooperation with highway route associations and the Ministry of Transportation and Communications. With the exception of the Frontier Route, which passes through the forests of Northern Ontario, the scenic routes are shoreline roads which take advantage of the exciting quality of land/water interfaces. Travel along the Bluewater Route offers an added dimension to the traveller's experiences by including the option to travel by ferry between Tobermory and Manitoulin Island.

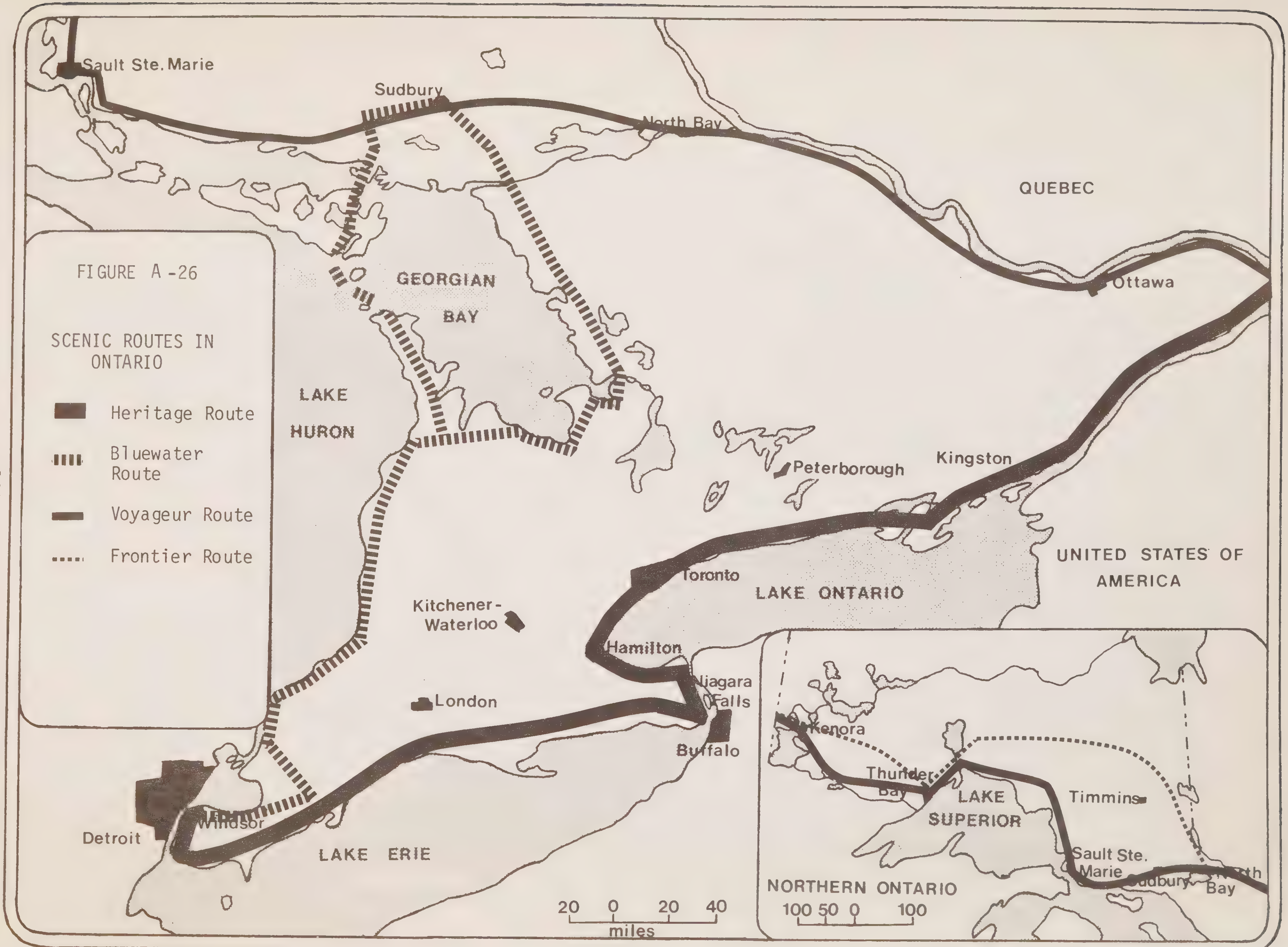


FIGURE A -26
SCENIC ROUTES IN ONTARIO
Heritage Route
Bluewater Route
Voyageur Route
Frontier Route
Sault Ste. Marie
Sudbury
North Bay
QUEBEC
Ottawa
GEORGIAN BAY
LAKE HURON
Kingston
Peterborough
UNITED STATES OF AMERICA
Toronto
LAKE ONTARIO
Kitchener-Waterloo
Hamilton
Niagara Falls
London
Buffalo
Detroit
Windsor
LAKE ERIE
20 0 20 40
miles
Kenora
Thunder Bay
LAKE SUPERIOR
Timmins
Sault Ste. Marie
Sudbury
North Bay
NORTHERN ONTARIO
100 50 0 100

ii) Air Travel and Related Infrastructure.--Air transport has greatly enlarged the scope for the international movement of people and has helped to improve world communications. It has been particularly effective in linking many areas where surface transport is absent, inadequate or time-consuming. The combination of the time saved and the convenience offered by air travel has opened up many new markets for the tourist industry in Ontario.

TABLE A-42

AIR TRAVEL TO AND WITHIN ONTARIO

ORIGIN	% OF TRAVEL BY AIR	SOURCE
Ontario	4.01	Canadian Annual Vacation Patterns Survey 1974
	2.0	Statistics Canada, August 1975
Other Canadians	36.28	Canadian Annual Vacation Patterns Survey 1974.
Other Countries	78.9 (Represents all Canada)	Statistics Canada, 1973

The concern about the disparities that existed in Northern Ontario compared to Southern Ontario influenced air transportation developments in the Province. In 1968, a remote airport development program was implemented with the objective of providing year round reliable transportation service to several remote settlements. In addition, a municipal airport subsidy program was provided for mid-northern Ontario municipalities.

To further address the disparity problems, the Ministry of Transportation and Communications sponsored a private sector operated airline, NorOntair. NorOntair, which was introduced four years ago, presently services 16 northern communities with scheduled daily flights and provides connections with national and regional airlines (M.T.C., 1976).

This development of local and feeder in addition to provincial airline services may also assist in distributing the benefits of tourism throughout the Province. The recreational/tourist traveller is no longer required to use other, more time consuming, modes of transport within the Province, perceptions of distance to destination are reduced, and now opportunities in wilderness/undeveloped areas of the Province become more accessible.

Scheduled air travel within the Province is largely serviced by five out of eleven carriers with rights to operate in the Province. The five air carriers providing the majority of the air services are: Air Canada, C.P. Air, Transair, NorOntar and Nordair. Figure A-27 displays their routes and frequency of flights. The map shows those airports which are central to all local, regional and provincial air activity: Toronto, Ottawa, Sudbury, Sault Ste. Marie and Thunder Bay.

Important to Ontario tourism are air access points from outside the Province. Figure A-28 shows Canadian and United States air routes with rights to operate prior to and as of May 8, 1974. The map shows only direct flights from Ontario centres to United States centres and vice versa for American routes. Montreal plays an important role in air tourism for Ontario as many American and Canadian flights (not shown on the map) departing and landing in Montreal service many other United States urban centres. Canadian-American routes from Ontario are only permitted from Toronto International Airport and London airport. Air routes originating from the United States may land at four airports; Toronto, Ottawa, Thunder Bay and London.

New Canadian routes with rights to operate by April 1979 are Toronto to San Francisco, Toronto to Boston and an extension of the flight from Toronto to Dallas and Houston. By April 1979 four additional American air routes will be given the right to operate, from San Francisco to Toronto, from Tampa to Toronto, from Houston to Dallas to Toronto and from Milwaukee to Toronto (refer to Figure A-29)

Chartered flights also play an important role in tourism. Within Ontario, there are numerous chartered flights leaving the Province to destinations in the United States and overseas countries. A major chartered flight operator in Ontario is Sunflight Holidays sponsored by The Royal Bank, offering one and two week Sunflight Holidays to several areas in Florida, Nassau, Freeport in the Bahamas, Jamaica, Barbados, Mexico, Hawaii and between Canada and Europe. There are many other chartered flights from Ontario; however, there are few chartered flights with the destination Ontario.

Recreational/tourist air travellers require a number of auxiliary services such as taxis, limousines, auto rental agencies, information services and, quite often, rail and bus carriers. In the larger airports in

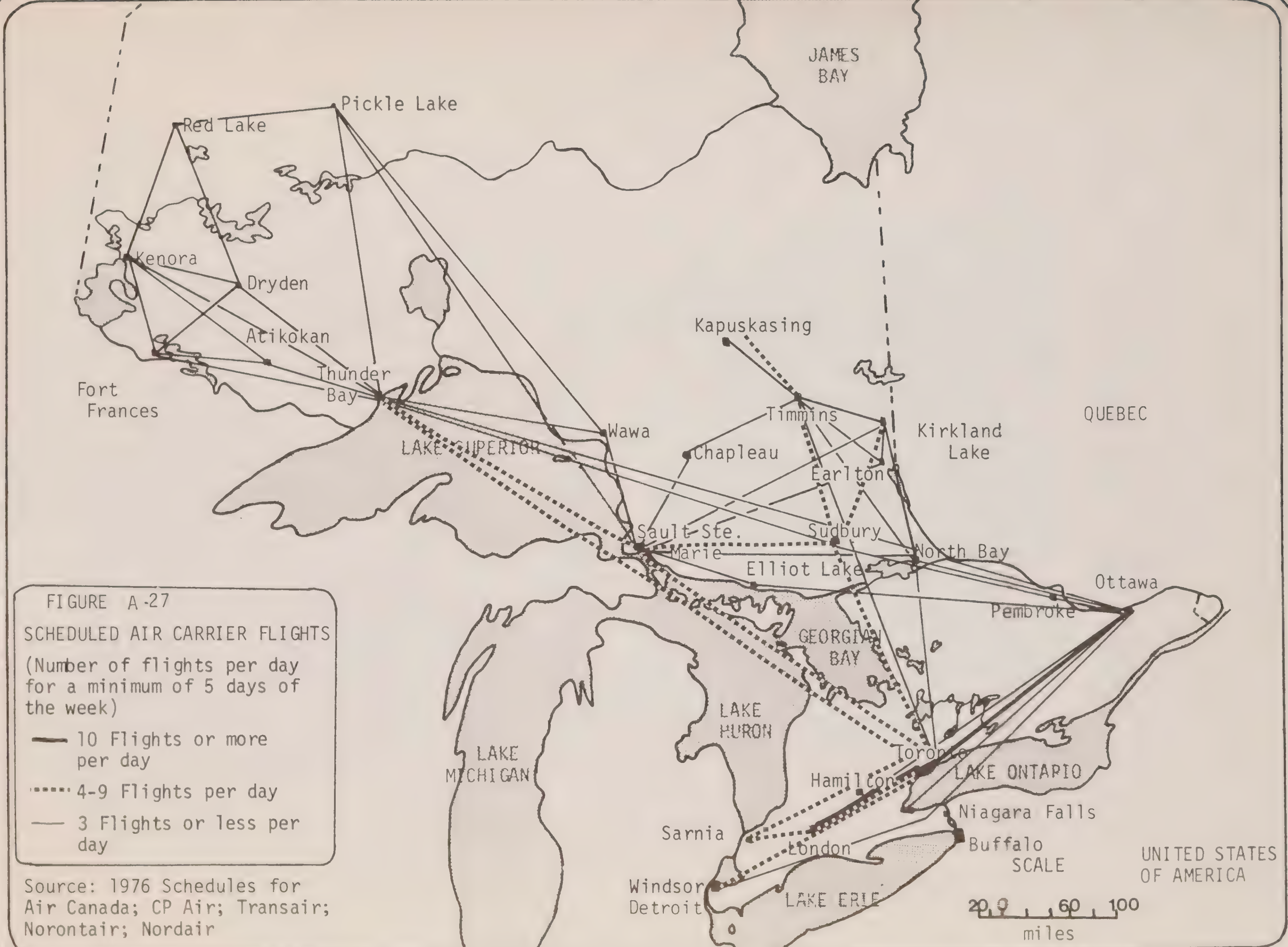


FIGURE A-27

SCHEDULED AIR CARRIER FLIGHTS

(Number of flights per day for a minimum of 5 days of the week)

— 10 Flights or more per day

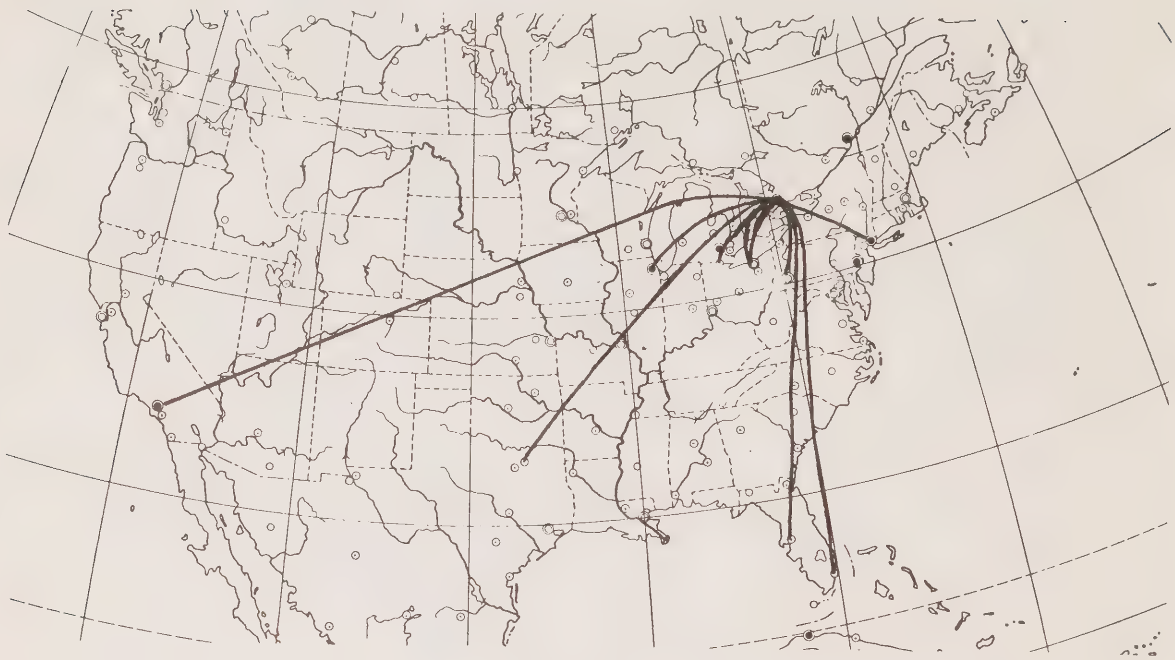
····· 4-9 Flights per day

— 3 Flights or less per day

Source: 1976 Schedules for Air Canada; CP Air; Transair; Norontair; Nordair

FIGURE A-28

CANADIAN AIR ROUTES TO THE U.S.A. WITH RIGHTS
TO OPERATE PRIOR TO AND AS OF MAY 8, 1974



U.S.A. AIR ROUTES TO ONTARIO WITH RIGHTS
TO OPERATE PRIOR TO AND AS OF MAY 8, 1974

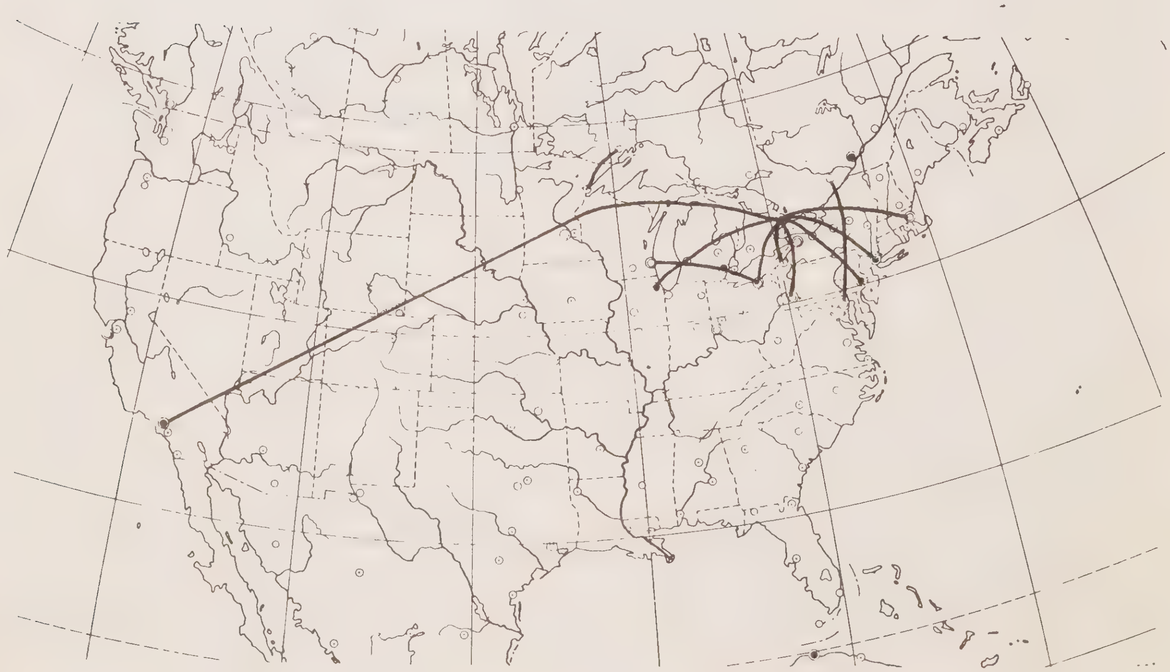
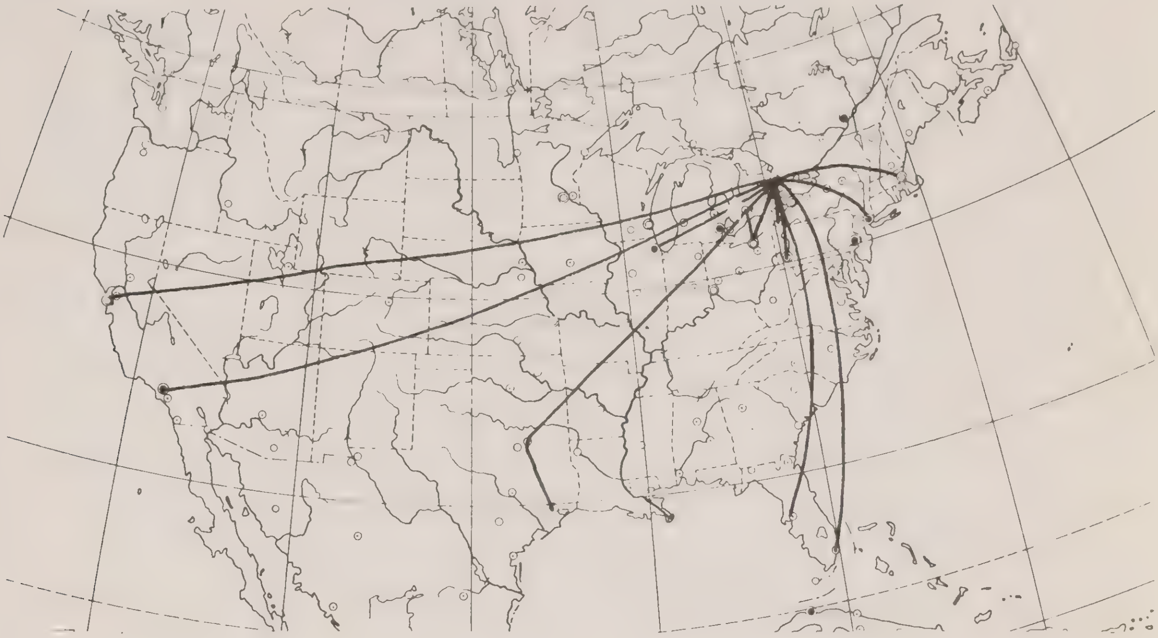
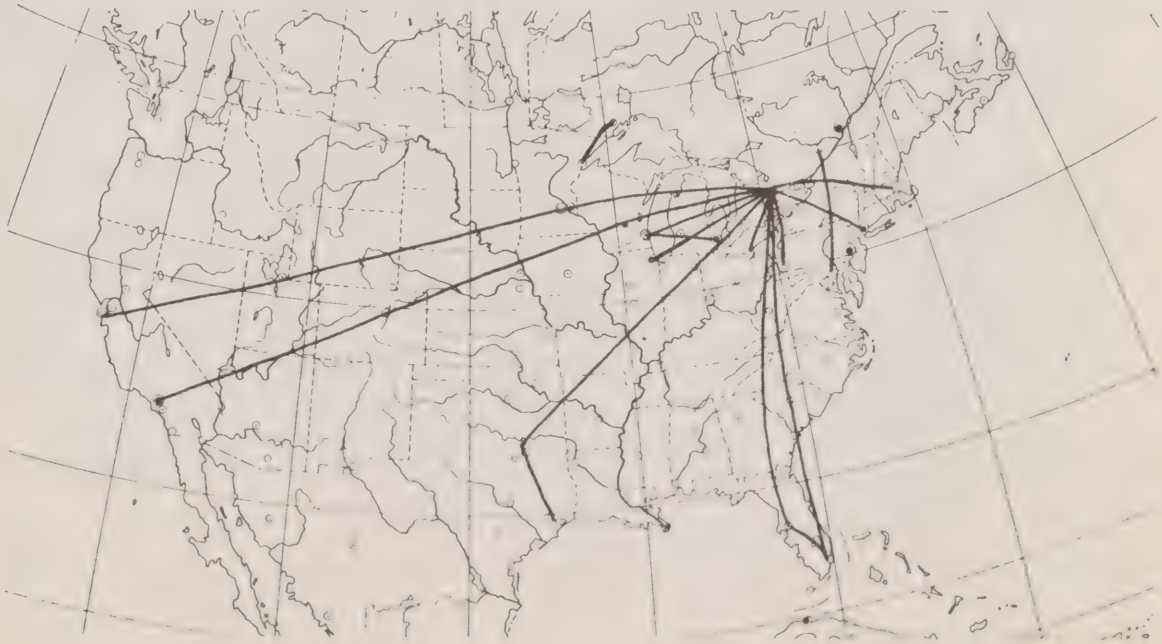


FIGURE A-29

PROPOSED CANADIAN AND UNITED STATES AIR ROUTES
(with rights to operate prior to and as of April 29, 1979)



PROPOSED U.S.A. AIR ROUTES TO ONTARIO
(with rights to operate prior to and as of April 29, 1979)



Ontario most of these services are provided. On travelling around the Province to conduct interviews with the Regional Tourist Consultants (Small Business Operations Division, O.M.I.T.), the consultants found that information services and co-ordination of rail and bus line connections require improvement for air travellers.

The business traveller makes up a large percentage of all air travellers to and within the Province. For this market group, commuter airline services are important. Presently there are commuter flights from Toronto to Montreal classified as Rapidair flights. The Stol air service between downtown Ottawa and downtown Montreal was reported to be successful (Financial Post, 1975). Stol airplanes, requiring less runway yardage and producing less noise pollution were introduced on a trial basis in 1975. If, at the end of September 1976, the Stol system is proved to be successful and a political decision is made to expand the services, the next stage in the development may be a route from Montreal to Toronto, including Ottawa and vice versa. Nordair is also being considered for operation rights to extend Stol services using DASH-7's, to Windsor, Pittsburgh, Pennsylvania and various other Ontario cities. In 1975, the Ontario government studied the possibility of operating Stol aircraft on a wider basis. The study looked into the potential demand for a Stol service operated by private carriers to 46 centres throughout Southern and Central Ontario including such places as Barrie, Bancroft, Brockville, Chatham, London, Owen Sound, Peterborough, St. Catharines, Oshawa and Woodstock. The hub of such a wide-ranging Stol air service would be the Toronto Island Airport (the Financial Post, Oct. 25, 1975).

iii) <u>Intercity Bus Travel and Related Infrastructure</u>--With the implementation of tour buses and with cost of fuel expected to reach $1.00/gallon within the year, it is anticipated intercity bus lines will plan an ever increasing role in recreational/tourism travel. Recent studies investigating mode of travel by tourists to and within Ontario, reveal that approximately 4 percent travel by bus and that the Ontario resident uses the bus to a lesser degree than non-residents (refer to Table A-43)

TABLE A - 43

BUS TRAVEL TO AND WITHIN ONTARIO

ORIGIN	% OF TRAVEL BY BUS	SOURCE
Ontario	3.1	Canadian Annual Vacation Pattern Study (1974).
United States	4.0	Statistics Canada, Aug. 1975.
Other Canadians	4.8	Canadian Annual Vacation Patterns Survey (1974).

Historically in Ontario, the use of intercity bus lines for recreational/tourist travel was viewed as undesirable because of:

a) a class-consciousness associated with bus travel (presently a high percentage of the passengers tend to be the very young, very old and lower income groups);

b) the inconvenience and lack of comfort relative to other modes of transport (buses have less leg room than planes or trains and such services as dining cars or in-flight meals are not available); and

c) long distance trips involve a number of stops en route and bus arrival times are generally late.

If bus carriers are to respond to the increasing use of intercity buses, they must be prepared to improve their services both in design of the vehicles and in the provision of express runs. Work must also be done to better the public image of travelling by bus.

Twenty-two intercity bus companies service the majority of cities, towns and villages in Ontario. Figure A-30 outlines the basic networks and routes for the five major bus companies. They include Gray Coach Lines Ltd., Eastern Canadian Greyhound Lines, Voyageur Colonial, Ontario Northland Transportation Commission, and the Grey Goose Bus Lines Company.

Four important bus companies whose routes have not been outlined in Figure A-30 but should be noted are Canada Coach Lines, Excel Coach Lines Ltd., Travelways and Charterways. Canada Coach Lines, situated in Hamilton, provides extensive services to communities around the western portion

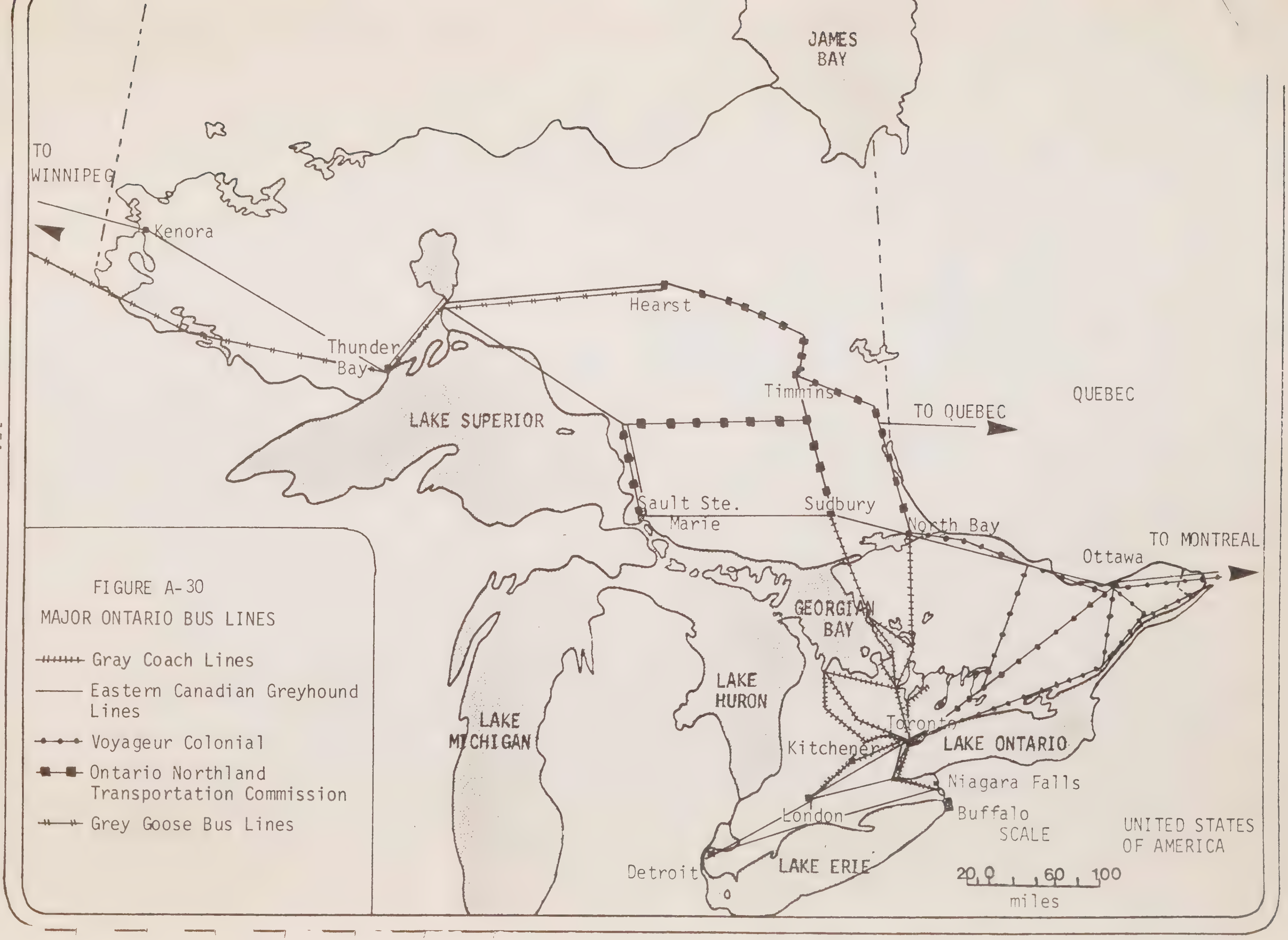


FIGURE A-30
MAJOR ONTARIO BUS LINES

of Lake Ontario. The Excel Coach Lines Company, located in Kenora, provides an important regional service to several small communities in Northwestern Ontario which are not serviced by other companies.

Substantial growth has been experienced in the area of packaged tours and charters in the last few years. The present trend in bus chartering is toward the packaged tour with transportation, meals, accommodation and admissions included (D.G. Austin, Regional Transportation Planning Office, 1975). There are approximately 31 tour companies in the Province which offer bus tours within the Province. These tours range in length from one day to ten days. Tour companies are also becoming involved in tours which include flying for part of the trip, and they are providing tours to areas where other modes of transport, i.e., train (Agawa Canyon and Polar Bear Express) and boat (1,000 Island Cruise) are part of the attraction.

A number of packaged day trips are available. The scheduled day trips are important to tourism because individuals or families can use the service any time without being part of a group organization. There are also a large number of day trip packages set up for chartered groups and organizations.

The largest market group presently using chartered bus tours tend to be older couples (many senior citizen clubs are involved). Few tours, with the exception of charter ski trips, are attracting the younger age groups (under age 45).

iv) Rail Travel and Related Infrastructure--Today rail travel is relatively insignificant compared to all other modes of travel. It is not a profitable venture in Ontario and across Canada. The vast distance between population centres and maintenance costs involved may account for rail passenger services becoming less economical. The two major companies (the Canadian National Railway and the Canadian Pacific Railway) have greatly reduced their passenger services and placed their emphasis on freight services. Discussions are presently underway to determine which of the two trans-Canada rail passenger services will be discontinued.

TABLE A -44

RAIL TRAVEL TO AND WITHIN ONTARIO

ORIGIN	% TRAVELLING BY RAIL	SOURCE
Ontario	1.4	<u>Canadian Annual Vacation Patterns Survey</u> 1974.
United States	.03	Statistics Canada, Aug. 1975.
Other Canadians	8.5	<u>Canadian Annual Vacation Patterns Survey</u> 1974.

Train service is currently being reviewed with the aim of improving services where potential exists. Under active study by the C.N.R. is the Montreal-Windsor corridor to investigate the potential of extending the present Turbo service from Toronto to Montreal.

There are six railroad networks in the Province (refer to Figure A-31). The two major companies (C.N.R. and C.P.R.) service the major centres in Ontario and run in an east-west direction across the Province connecting neighbouring provinces. The other four companies service specific regions in the Province. Connecting rail lines to the United States are only available at Windsor and Niagara Falls.

The two railroad networks in Northern Ontario (the Ontario Northland Railway and the Algoma Central Railway) have attempted to serve the pleasure traveller. The rail service to the Agawa Canyon operates year round and packaged bus/rail tours are available offering fall colour and winter scenery excursions. The Polar Bear Express, operated by the Ontario Northland Railways, attracted a number of pleasure travellers during its first two years of operation. However, in 1975 a dramatic decrease in visitation was reported. The lack of development in Moosonee may account for this decline in interest.

Various attempts have been made in the last few years to operate special purpose recreational trains. In particular, the C.N. route to Barrie and on to Stayner, Collingwood and Meaford has had several of these runs. Several rail alignments throughout the Province do line

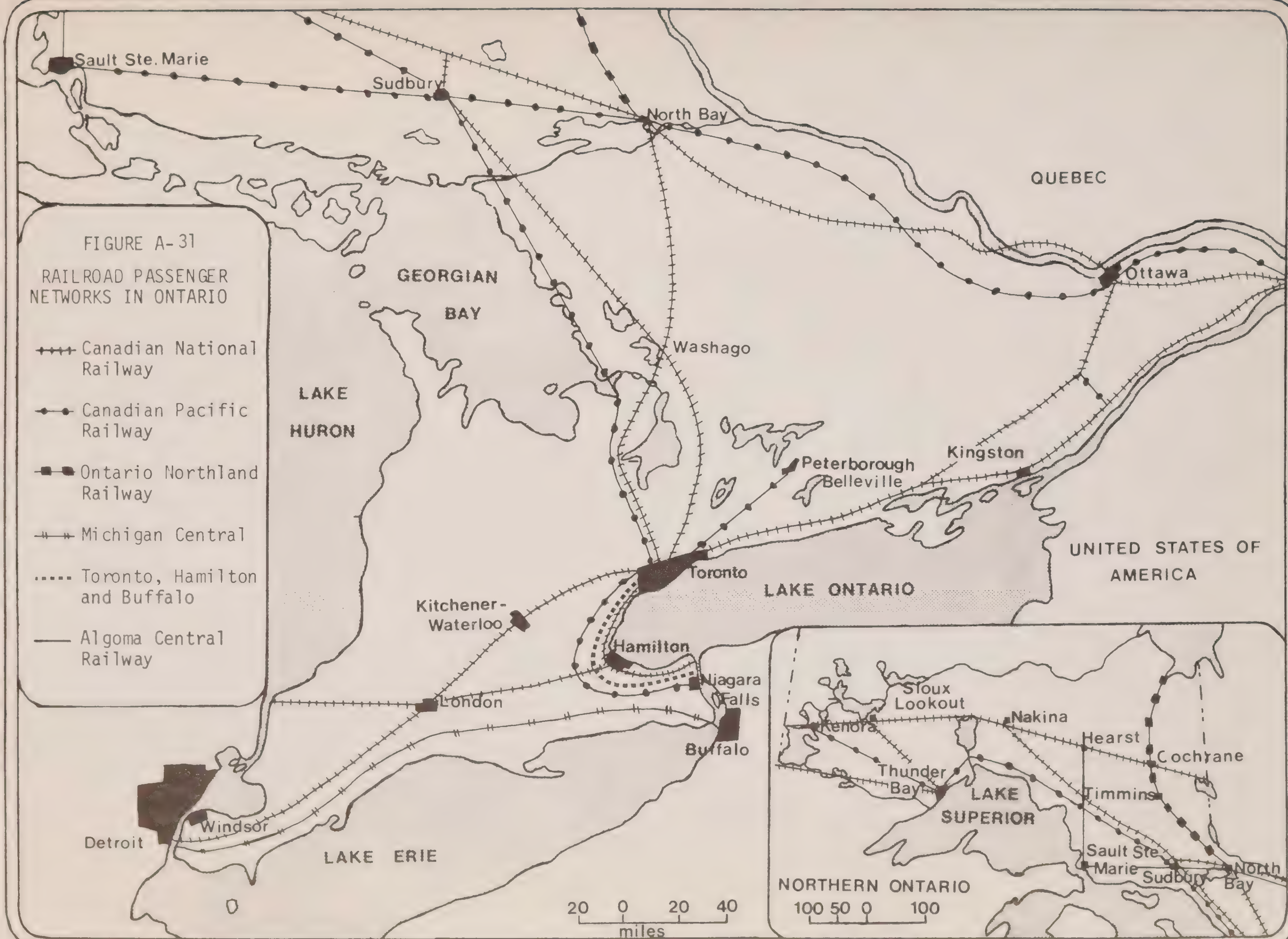


FIGURE A-31
RAILROAD PASSENGER NETWORKS IN ONTARIO
Canadian National Railway
Canadian Pacific Railway
Ontario Northland Railway
Michigan Central
Toronto, Hamilton and Buffalo
Algoma Central Railway
Sault Ste. Marie
Sudbury
North Bay
QUEBEC
Ottawa
GEORGIAN
BAY
Washago
LAKE
HURON
Peterborough
Belleville
Kingston
UNITED STATES OF
AMERICA
Toronto
LAKE ONTARIO
Kitchener-
Waterloo
Hamilton
Niagara
Falls
London
Buffalo
Windsor
Detroit
LAKE ERIE
20 0 20 40
miles
Sioux
Lookout
Kenora
Nakina
Hearst
Cochrane
Thunder
Bay
LAKE
SUPERIOR
Timmins
Sault Ste
Marie
Sudbury
North
Bay
NORTHERN ONTARIO
100 50 0 100

up with natural recreational/traveller routes or corridors. The possibility does exist that these alignments could be used to service recreational travel. Unfortunately, the cost of operating trains for this purpose is almost prohibitive at the present time.

Even though passenger services are being reduced, the importance of rail service to tourism perhaps has yet to be exploited. Before train travel is written off as a victim of economic competition it may deserve a second chance in the interest of both private and public gain (Gunn, 1972).

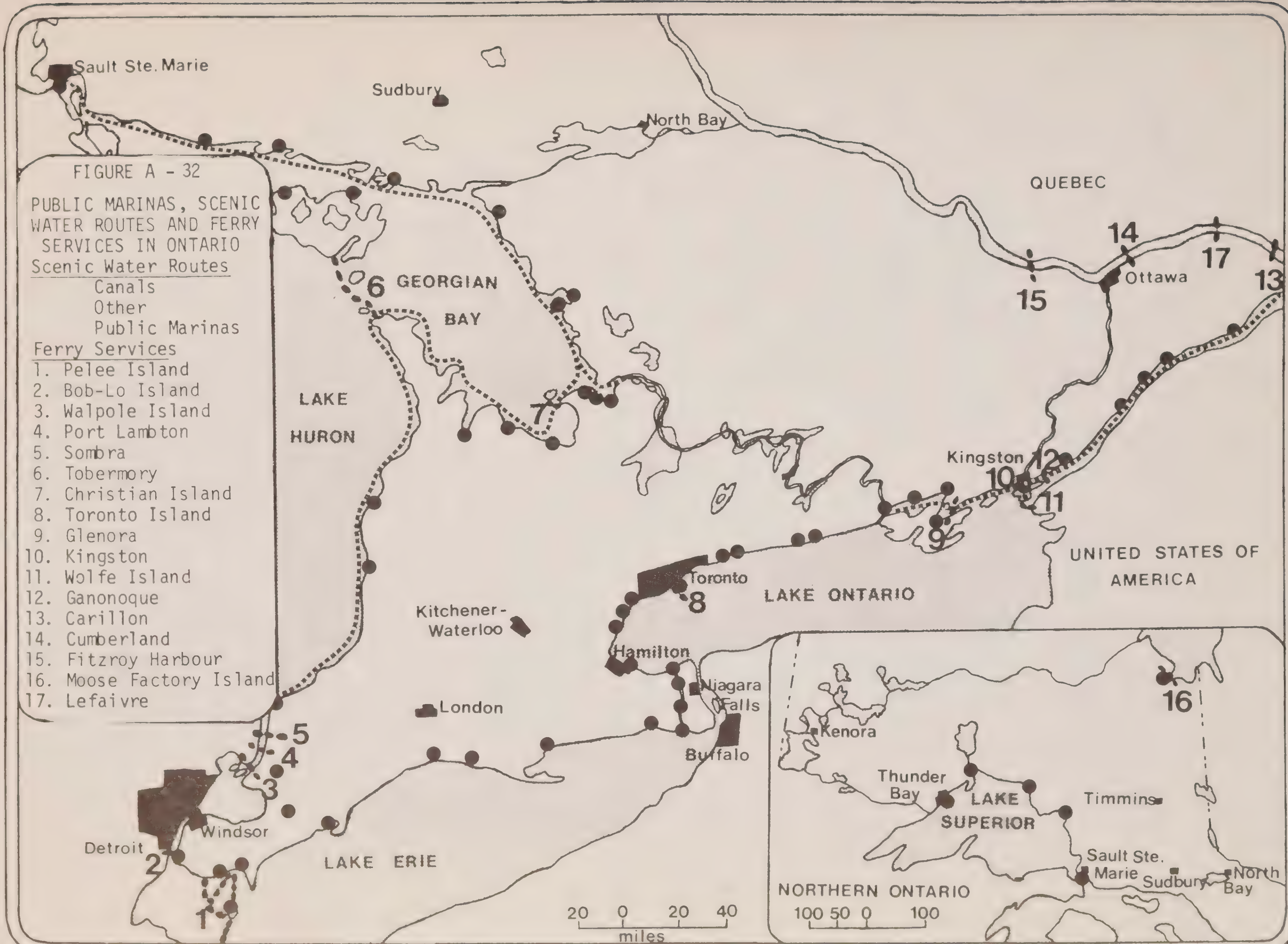
The train traveller has great freedom of physical movement. He can view the landscape more freely and more completely. Cities and countrysides can be viewed in a manner impossible from automobile or plane. It would seem that if new design considerations could be applied to railway environmental corridor, and if new merchandising techniques were employed (linkage with rental cars at termini, sales of package tours, and interpretive narrations en route), railway travel could again become a simple, effective, comfortable, and hopefully, competitively priced means of travel for pleasure (Gunn, 1972).

v) <u>Boat Travel and Related Infrastructure</u>--Today boat transport plays a minor role in the movement of people, with boat passenger travel primarily being recreational/tourism oriented. Ontario's Great Lakes water system and inland water systems such as the Rideau-Trent-Severn Canal, Lake Nipissing, Lake Simcoe, etc., provide numerous opportunities for boating of all kinds. No other interior province in Canada contains water resources comparable to those of Ontario. This resource has tremendous potential for tourism development in the Province.

With the exception of ferry services and a few commercial pleasure cruises, the majority of the pleasure boating is by private vessel. Related boating infrastructure such as marinas, launching and mooring facilities are of concern for tourism planning and development. The Ministry of Transport operates a number of marina facilities along the Great Lakes shorelines and along the Welland Canal (refer to Figure A-32). A number of commercial marina facilities are also found along the Great Lakes shorelines. The inland water systems are largely serviced by commercial marinas. In Northern Ontario, clusters of commercial marinas are found in the Lake of the Woods, Lake Nipissing and Lake Timagami area.

FIGURE A - 32

PUBLIC MARINAS, SCENIC WATER ROUTES AND FERRY SERVICES IN ONTARIO



There is a definite difference in the type of boating and size of vessel found on the Great Lakes and inland water systems. On the Great Lakes, large yachts and sailing craft are found; larger craft are also found on the larger inland waters such as Lake Nipissing, Lake of the Woods and Lake Simcoe. The inland water systems are characterized by smaller pleasure craft such as power boats, smaller sailboats and canoes. Inland water boating tends to be associated with other activities such as fishing, cottaging and camping; whereas boaters on the Great Lakes tend to have cruising as their prime purpose.

In 1976 the federal Minister of Transport and the provincial Minister of Tourism and Information jointly undertook a study and plan for the development of the 425 mile Rideau/Trent/Severn land and water recreation corridor. The system contains a unique mixture of recreation features - lakes, beaches, fishing waters, scenic landscapes, natural sites such as waterfalls and caves, and historic and archaeological sites of national significance (CORTS Study Committee, 1971). Use of this canal system is largely by pleasure craft with very little commercial traffic.

The Rideau-Trent-Severn Waterway is also connected to three other central Canadian boating routes. To the east, the Ottawa-St. Lawrence route offers a protected 240-mile trip. To the west and north, a route from Port Severn to Sault Ste. Marie covers a distance of 360 miles through the protected waters of the Thirty Thousand Islands of the Georgian Bay and the North Channel of Lake Huron. Yet another boating route to the west and south follows the shoreline from Port Severn to the Bruce Peninsula and along the eastern coast of Lake Huron to Sarnia (Figure A-31).

The need for more marina facilities and complexes including restaurants, accommodations, and attractions along the canal systems was expressed by the Regional Tourism Consultants (Small Business Operations Division, M.I.T.). Generally, throughout the Province the packaging of marinas, accommodations and food services was expressed as needed. In addition, there is a need for more winter boat storage facilities.

Boat rental agencies are playing an increasing role in Ontario tourism. In particular, houseboats appear to have great potential in that they are easy to operate and provide an alternative for second residences.

TABLE A -45

UNITED STATES VISITORS VISITING ONTARIO BY BOAT*

AREA OF ENTRY	NUMBER	PERCENT
St. Lawrence/Ottawa	31,054	24
East Lake Ontario	230	.10
West Lake Ontario	3,889	2.0
Metro Toronto	959	.50
South Western Ontario	137,640	64
Georgian Bay	553	.2
Northern Ontario	17,819	8
TOTAL	212,144	100

*Note: These figures include travellers entering Ontario by ferry
Source: Statistics Canada, August 1975.

A large number (5 percent) of American visitors enter Ontario by boat. The figures in Table A-45 indicate that the majority of American boating in Ontario is taking place on Lake Erie, on the St. Lawrence and on Lake Superior/North Channel.

Ferry services, provided by both public and private agencies add to the tourism experience. Most are car ferries, the largest being the "Chi-Cheemaun" which provides ferry services from Tobermory to South Baymouth and has a carrying capacity of 560 passengers and 113 cars.

Many of the ferry services are designed to appeal specifically to the pleasure travellers (some provide transportation connecting land points as well. Both the Tobermory-Baymouth run and the Gananoque 1000 Island run offer the travelling public a scenic cruise with dining and cocktail facilities plus recreational facilities.

Figure A-32 outlines ferry services available in Ontario. Operating hours vary by season, providing increased service from the beginning of June to September.

vi General Summary of Travel Modes--When planning for tourism, transportation availability is an important consideration in assessing the tourism potential of an area. Transportation service availability of twenty-six cities in Ontario is shown in Table A-46.

Provincial highways provide access to most centres and areas throughout the Province. Accessibility by modes other than the automobile, however, is somewhat limited. Of the twenty-six cities cited, bus transportation provides more services to other nodes without transfer than air or rail. In turn, train services provide more access to other centres in Ontario than air.

TABLE A -46

NUMBER OF NODES THAT CAN BE REACHED
WITHOUT TRANSFER FROM EACH CENTRE,
BY MODE IN ONTARIO

NODE	AIR	BUS	TRAIN
Toronto/Mississauga	23	24	19
Cornwall	0	5	6
Ottawa	13	8	14
Brockville	0	6	7
Kingston	0	7	6
Belleville/Trenton	0	4	6
Peterborough	0	3	1
Oshawa/Whitby	0	5	5
Hamilton	4	8	6
St. Catherines/Niagara Falls	0	4	2
Kitchener/Waterloo	0	5	3
London	5	6	6
Sarnia	2	2	2
Chatham	0	5	4
Windsor	7	4	4
Barrie	0	4	4
Pembroke	1	4	13
North Bay	2	20	19
Sudbury	5	17	16
Sault Ste. Marie	7	14	1
Fort Erie/Welland	0	4	2
Kirkland Lake	3	4	2
Timmins	3	6	1
Kapuskaping	0	3	14
Thunder Bay	4	14	15
Kenora	4	14	15

*Source: Ministry of Transport, Interim Report on Inter-City Passenger Movement in Canada, June, 1975.

In addition to the availability of transportation services, travel costs and travel time may influence the traveller's perception of accessibility. The following table (A-47) outlines the travel cost (rate in cents per mile) and travel time (on-board speed in m.p.h.) by mode of transport to twenty-four centres in Ontario from Toronto.

TABLE A - 47

1972 MODAL TRANSPORT ACCESSIBILITY TO TORONTO

	RATE (CENTS/MILE)				ON BOARD SPEED (M.P.H.)			
CENTRE TO TORONTO	AIR	RAIL	BUS	AUTO	AIR	RAIL	BUS	AUTO
Pembroke	14.7	3.6	4.3	3.7	136	47	43	54
North Bay	12.4	4.5	3.6	3.7	207	39	37	57
Sudbury	11.4	3.8	4.2	3.7	151	43	45	57
Sault Ste. Marie	9.8	4.3	3.7	3.7	306	45	46	56
Fort Erie/Welland		4.4	4.4	3.7		58	49	59
Kirkland Lake	10.0	5.2	3.9	3.7	156	23	40	57
Timmins	9.2	4.2	4.3	3.8	217	27	53	56
Kapuskasing		4.0	4.3	3.7		32	39	56
Thunder Bay	8.0	4.6	3.7	4.7	404	40	42	55
Kenora	6.0	3.2	3.6	5.2	285	39	41	55
Cornwall		5.0	2.9	3.7		44	55	59
Ottawa	11.1	3.6	4.9	3.7	282	49	54	55
Brockville		4.3	3.4	3.7		52	53	59
Kingston		4.3	3.6	3.7		51	61	60
Belleville		4.4	3.7	3.7		54	46	59
Peterborough		3.9	4.2	3.7		36	47	56
Oshawa		6.1	4.4	3.7		46	24	62
Hamilton	5.6	5.8	5.1	3.8	31	43	31	64
St. Catherines		5.7	3.8	3.8		38	52	60
Kitchener		5.1	3.7	3.7		37	33	57
London	15.9	4.4	3.4	3.7	176	42	53	57
Sarnia	13.7	4.5	3.4	3.7	133	45	46	56
Chatham		4.5	3.6	3.7		44	48	57
Windsor	11.8	4.0	3.3	3.7	244	46	52	58
Barrie		5.2	4.3	3.7		37	37	62

Source: Ministry of Transport, Interim Report on Inter-City Passenger Movement in Canada, June 1975

c. Future Implications for Tourism

This discussion has primarily dealt with existing supply of transportation services. Many problems, such as congestion, exist with all transportation services which have severe peaks, unbalanced flows and seasonal patterns. There are also strains which are being felt on energy and resources. A recent survey* has predicted that both weekend and vacation trips will increase because of the increase in: population, leisure time per capita, awareness of the outdoors, and the need for relief and contrast from the big city environment. These increases in the desire to travel will bring about further problems for the future.

The energy situation is likely to have the greatest impact on mode of transportation used for recreational/tourism travel. The response given to the energy question by the delphi panel produced three scenarios which are summarized below.

Scenario One

Tourism is a way of life. There are reliable indications that supply rather than price is the main factor affecting tourism for those using cars. Cars will continue to be the main tour vehicle because of their great convenience, especially for families. There will be fluctuating periods during which tourism will wax and wane, especially during the formulation period of energy policies. There will be a growth in the tourism marketing field to ensure justification of vacation costs and more planning will go into vacations. The psychological impact of the energy scenario may be more detrimental than the real one.

Scenario Two

There will be a substantial shift from the use of the private car to all forms of public transportation. Package/group tours and charters will be increasingly popular. The promotion and development of package/group travel will play a major role in Canada's ability to compete for the foreign tourist dollar. There will be more efficient use of "price

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*L. J. D'Amore and Associates Ltd., Tourism in Canada 1986, Round 1, Delphi Survey

sensitive" air travel; fewer short-distance trips by car will be taken because air travel will allow long distance trips at the same cost. Public transportation routes will favour urban destination areas causing considerable impact on metro-centres which will receive a greater share of air, bus and rail traffic. There will be less "ad hoc" business travel.

Scenario Three

Gasoline rationing and even the restriction of the private car for non-essential purposes will be necessary due to severe shortages of supply. We can expect to see very severe declines in short to medium distance travel by Canadians with massive increases in rail and bus travel. "Public-type" vacations will be more common, such as the commercial resort as opposed to the private cottage with its associated use of energy consumptive recreation vehicles. If alternatives to the internal combustion engine are not found, there will be less use of motor highways. Highway-oriented motels and service centres will have less business. There will be a tremendous demand for total destination complexes close to large urban centres. Promoting tourism projects to private industry will prove difficult. There will be violent cyclical impacts on the location and types of tourism capital investments. These factors and consequences will severely reduce tourism. (Source: Synopsis of Views from Round 1, Delphi Survey, Tourism in Canada 1986, L.J. D'Amore and Associates, Ltd.).

7. Service Centres

Cities are critical in the tourism system. They serve the tourist by functioning:

a) as nodes providing clusters of direct services (e.g., hotels, motels restaurants, gift shops, gasoline stations, places of entertainment),

b) as nodes with clusters of secondary suppliers for tourism industry services (e.g., food and other types of wholesalers, laundry services, construction companies, insurance and accounting agencies), and

c) as nodes which themselves provide attractions and events--historical and cultural attractions and events, in particular, often have foundations at urban nodes rather than elsewhere.

If there is to be additional development and expansion of services, existing urban centres should be the focus for this provision. Incorporating on-going service centre nodes utilizes the existing investment in public services rather than creating newly planned communities, at great initial investment cost, for what is currently (in Ontario) a highly seasonal trade. The advantage of clustering services lies in the ability of a business node to provide for a larger critical mass of business and a stronger relationship to attractions.

The complex nature of the Ontario economy has produced a hierarchical system of service centres. The geographical expression of this system stems directly from the uneven distribution of economic activities within the province. Certain commonly sought goods and services, which require a relatively small supportive population to justify their existence, are available at nearly all urban places. Alternatively, the provision of some other goods and services (e.g., specility shops) require a large market. For the latter types of goods and services, the consumer will travel longer distances, but less frequently. The former functions are commonly termed low-order while the latter are the high-order functions. These tend to be found only in the largest urban centres; that is, the ones which are most accessible and have the largest trade areas.

Service functions are normally additive, each centre usually containing all levels of functions below the highest. Subsequently, each centre

in the hinterland depends upon the centre(s) of a higher order for those services it does not supply for itself. This form of urban interdependency and interaction is evident among the tourism-related service centres.

The service centre hierarchy presented in Figure A-33 has been adapted from a classification of the functional role of selected urban centres developed by T.E.I.G.A., which combines the following factors to calculate an index of the relative strength of the service role: (i) level of specialization, determined from position in a six-level hierarchy of aggregated service functions; and (ii) the degree of diversification or choice available within that particular level of specialization.

Not surprisingly, careful investigation reveals that the hierarchical position of the urban centres, as identified by T.E.I.G.A. correlates with the degree of specialization and the diversity of goods and services which centres can offer directly or indirectly to satisfy the traveller's needs. Even the number and magnitude of tourist attractions and events that are situated within the urban centres is a reflection of the hierarchical level to which they are appointed. Consequently, the pattern which emerges when tourism-related service centres are singled out, is only slightly different from that emerging from the T.E.I.G.A. classification scheme. The tourism-related service centres are adequately described on four levels, whereas, six appear in the T.E.I.G.A. classification.

Some centres which have been included in the T.E.I.G.A. classification do not, at the provincial level of analysis, contribute substantially to tourism. These centres currently provide relatively few tourism related goods and services and offer few, if any, tourist attractions or events. They may in the future, however, become more significant as tourist service centres if demand from travellers cannot be met by existing centres.

Recognition must also be given to some communities which do not appear within the T.E.I.G.A. classification. These communities provide, at a local level, a relatively large number of direct services and/or attractions in relationship to their meagre overall functional role because they exist in areas where tourism visitation is high. In many of these localities the higher-order services are offered only on a seasonal basis, reflecting the seasonal nature of tourism in their hinterland. Among this type of urban centre are Niagara-on-the-Lake, Stratford,

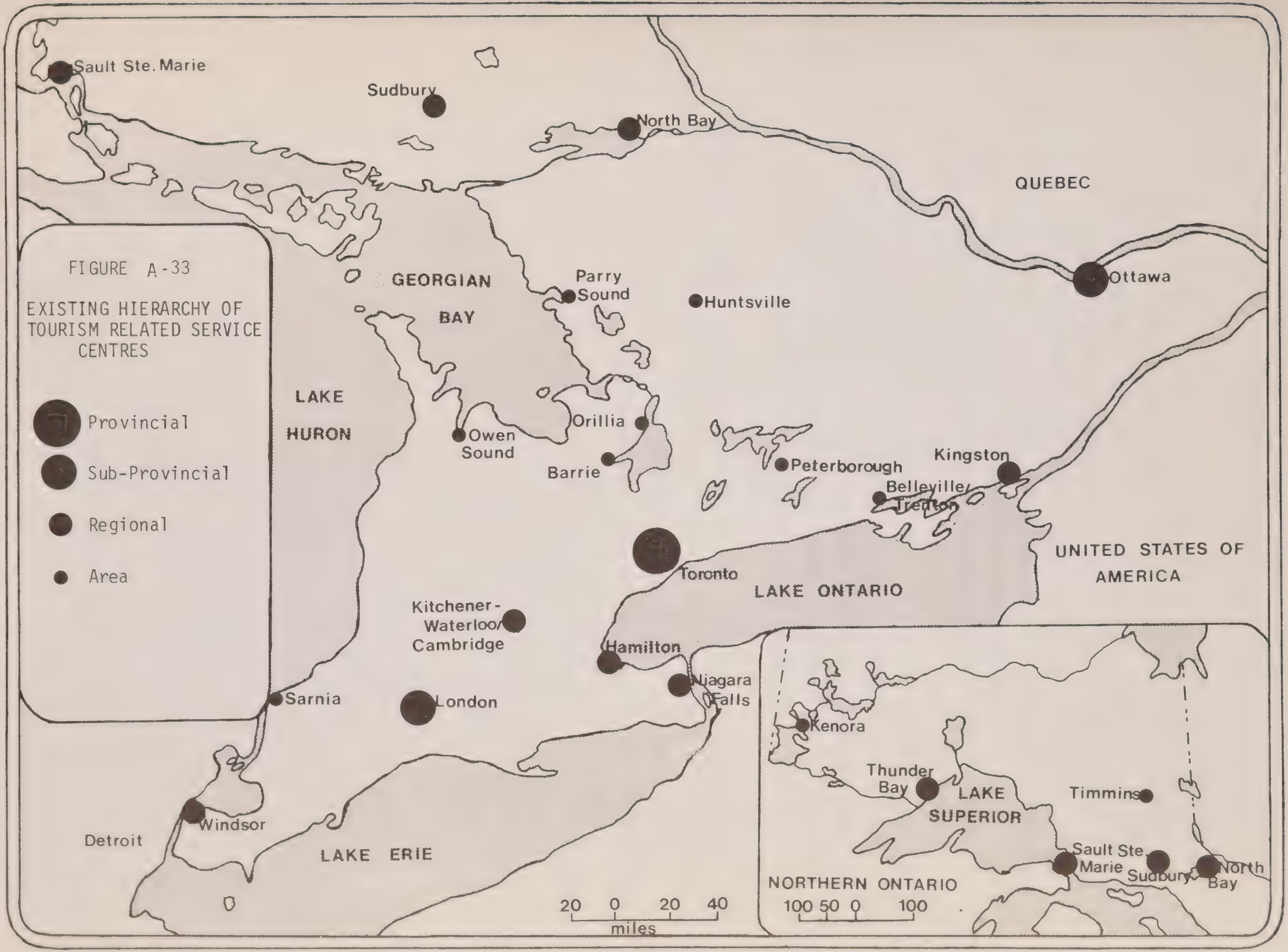

FIGURE A-33

EXISTING HIERARCHY OF TOURISM RELATED SERVICE CENTRES

Tobermory, Collingwood, Wasaga, Minden, Gananoque, Alban, Noelville, Sturgeon Falls and Thessalon. These are not included on Figure A-33 as additional centres of this nature are expected to emerge as the zone concept is applied and they will be discussed at that level.

In view of the more diversified economic base, the higher indigenous population and the larger number of sizeable cities, the urban stratification is more complex in southern Ontario than northern Ontario. The centres in the southern part of the Province are able to offer a higher order of goods and services and also more variety to the tourist than their counterparts in the north. Similarily, the comparatively high number of attractions and events located within even the smaller urban centres of southern Ontario is due to the proximity of large masses of population within the Province and also within bordering American states.

Toronto is the only service centre of provincial significance. Its service radius is certainly province-wide and Toronto provides the widest range of and most specialized accommodation, dining, shopping and entertainment opportunities in Ontario. The internal transportation network is extremely sophisticated and efficient and offers a wide choice in travel modes, including subway, bus and taxi. This city also provides the greatest variety of indirect services to the tourism industry throughout the Province. In addition, a majority of attractions and events of provincial significance are clustered within Toronto (i.e., Ontario Place, Ontario Science Centre, the C.N. Tower, the Canadian National Exhibition, the International Sportsman's Show, the Royal Agricultural Winter Farm and many more).

The next order of service centre includes Ottawa and London, which are classified as sub-provincial service centres. Ottawa, the federal capital, is the only centre of any magnitude in eastern Ontario. London has a strong, financial, insurance and real estate component in its economic base. Both cities have developed a fairly high order and wide variety of goods and services which are supplied directly to the tourist, as well as, to the tourism industry in various parts of the province. A number of major attractions and events are located within both cities and internal transportation networks are efficient.

Numerous centres, Windsor, Kitchener-Waterloo, Cambridge, Hamilton, Niagara Falls-Welland-St. Catharines, Barrie, Kingston, North Bay, Sudbury,

Sault Ste. Marie and Thunder Bay, provide direct and indirect services to tourists on a regional basis. As has been noted previously, those in southern Ontario offer a higher order, wider choice of accommodation, dining, entertainment, shopping opportunities, attractions and events than their counterparts in northern Ontario because of the more diversified economic base and larger indigenous population in that part of the Province. Niagara, Windsor and Niagara Falls are entry points from the United States.

The area level service centres (Figure A-33) are of local importance. They provide the essential services to tourists offering a comparatively limited choice in accommodation, dining, entertainment and shopping. These centres contain relatively few attractions and those are generally of regional rather than provincial significance.

a. Future of Service Centres

A preliminary analysis undertaken by T.E.I.G.A., indicates the manner in which the functional roles of 36 selected urban places are expected to change over the next 30 years, both in degree of diversification and the level of specialization. The projected index of relative strength of the service functions for each urban place in the year 2001 was predicted on the basis of planning guidelines and preliminary population projections, or targets where available. The existing urban system is expected to change little in the next 30 years.

In the centres, which have been identified as tourism-related service centres, an increase in the variety and level of tourism-related service is expected to occur in conjunction with further diversification and specialization in their overall functional service role. Any additions to the total number of tourism-related service centres or changes to the quantity or quality of tourism-related goods and services will be dictated by the direction in which the tourism industry moves in the next 30 years.

Forecasts unanimously indicate that the population will continue to gravitate towards the larger urban centres in southern Ontario. Consequently, the current disparities in levels of diversity and specialization between southern service centres and their counterparts in northern Ontario will persist and possibly increase unless intervention occurs.

In the future the tourism-related service centres will be based, where possible, within the zone framework on existing service centers. The provincial and sub-provincial centres will, in all likelihood, continue to function in that capacity with no additional centres becoming operational at those levels. However, within the zone context, heirarchies of tourism-related service centres are expected to emerge. The service roles of the regional and area service centres will be strengthened within the zone framework as they assume their positions at the top levels of the zone heirarchies. Smaller service centres, which from the provincial perspective do not merit consideration, will appear as the lower level tourism-related service centres.

There are currently numerous small centres which supply tourism-related services on a seasonal basis. Those centres serving areas where the tourist season becomes year round, will maintain those services throughout the year and there will be a propensity for the increase of their quality. Finally, all tourism-related service centres in a hinterland where the tourism season is extended can be expected to increase not only the quality, but also, the quantity and diversity of the supply goods and services, as it becomes economically viable to do so.

8. Population

Population is a major factor affecting many aspects of development. There are, in fact, few major development issues where population does not enter into consideration. The scrutiny of demographic trends, including changes in population size, geographical distribution and in the structure of the population (i.e., age composition, family size and labor force), is a necessary prerequisite to the planning of provincial development and the allocation of resources.

Human resources relate to tourism in a number of ways; as a market, (a population with the ability and desire to participate); as the population base which provides the ancillary services in tourism-related service centres and destination areas; and as a part of the attraction, when ethnicity, cultural heritage, or lifestyles form the basis or theme of the attractions/events that motivate visitation. Within the framework of this section, the discussion will focus on the population as the human resources necessary to adequately develop and promote tourism and the anticipated impact that demographic trends will have on tourism throughout Ontario. In addition, the various ethnic origins and historical features which describe the heritage of the population of this province, will be examined to determine where there is potential for the development of historical or cultural attractions and events that will engender tourism visitation. If tourism is to play a vital role in the provincial economy and be considered in provincial development and in the allocation of provincial resources, then the study of population is necessary in the effort to plan for tourism development.

There are two sources of population change; natural increase (i.e., births over deaths) and net migration. "During the 20th Century, net migration has been responsible for 37.5 percent of the population growth in Ontario" (T.E.I.G.A., September/October 1973, p. 1). However, while net migration can be described as the most volatile factor in Ontario's population growth, it is the most difficult to forecast. Its effects are more immediate and more complex than those related to natural increase.

The Regional Planning Branch of the Ministry of Treasury, Economics and Intergovernmental Affairs has studied how various demographic factors have influenced the pace and pattern of population change in different

segments of the province during the last three decades. The Branch has also attempted to forecast what is likely to occur toward the end of the Twentieth Century if these demographic forces continue to operate in a similar manner. This does not imply that the future will not deviate from the forecasts; rather, it should be noted that the social and economic forces which affect the future, are, in our complex society, not easily altered. Consequently, changes in trends might emerge only over an extended time period. It has been pointed out, however, that "the projected trends should not be looked upon so much as prophecies or assertions about the future, but as aids for decisions for anticipating future problems, and more appropriately, as benchmarks for devising alternatives, if necessary, among which choice is possible" (T.E.I.G.A., October, 1975, Volume II, p. 3).

Some recent major development decisions will also affect the trend of population distribution in Ontario. The provincial government has, for some time and in a variety of ways, been attempting to alter the Design for Development policy and a number of special development proposals (e.g., the North Simcoe and Northumberland Task Forces, the Northwestern Ontario Development Strategy), new towns (e.g., North Pickering, Jarvis), and legislation (e.g., the Planning and Development Act). "At the same time, both private corporations and quasi-public agencies have proposed--and in some cases are committed to--a number of extraordinary development projects" (T.E.I.G.A., October, 1975, Volume II, p. 3). A number of these developments are already under construction, or construction is about to commence. Many people fear that these projects will eventually lead to the extensive urbanization of central and southwestern Ontario, where most of these developments are situated. There is also concern that these projects may accentuate migration loss from eastern and northern Ontario, or pre-empt from these areas the prospects of further industrialization.

a. Population Projections to the Year 2001

There are at present five sets of population projections available, which include: Ontario government (i.e., Economic Analysis Branch of T.E.I.G.A.), S.R.G.*, Central Mortgage and Housing Corporation and Lithwick.

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*System Research Group who published Canada 2000, 1970.

The disparities among the results produced do not become substantial until the year 2001. At this time the differences range from a low of about 2 million (11½ million versus 13½ million: Ontario government compared to S.R.G. projects) to a high of 3½ million (11½ million versus 13½ million: Ontario government compared to Lithwick N-4 projects).

The assumptions underlying the various population forecasts have been examined in detail to determine what would be the most likely forecast for Ontario. The Ontario government projection was selected for this work. According to this projection, the provincial population will be 9,753,000 by 1986 and 11,646,000 by 2001.

b. Geographical Distribution of the Future Population

The following summary* describes the expected geographical distribution of the future population.

1. There will be continuous population growth in Ontario. Over the next 30 years, the province will increase by close to 4 million people, which is roughly the same increase as that which took place between 1941-1971. However, the rate of change during the next 30 years will be much slower - 1.4 percent in 1971-2001 versus 2.4 percent in 1941-1971 (Table A-48).
2. Central Ontario is the only planning region which is expected to continue to increase its provincial share of population, while the share of all other regions will decline. In 1971, the six major Census Metropolitan Areas (C.M.A.) held about 60 percent of the total provincial population (Figure A-34), but they are expected to gain between 3/4 percent (under Assumption A) and 4/5 percent (under Assumption B) of the total growth in the province during the next 30 years (the six C.M.A. are: Toronto, Hamilton, Ottawa, London, Kitchener/Waterloo and Windsor) (Table A-49).
3. During the next three decades, about half of the total population growth in the province will be comprised of natural increase with

*Ontario's Changing Population, Volume II, Ministry of Treasury, Economics and Intergovernmental Affairs, October 1975, p. 5).

TABLE A - 48

COMPARISON OF POPULATION CHANGE, ONTARIO,
1941 - 1971 VERSUS 1971 - 2001

PERIOD	POPULATION CHANGE	
	No.	ANNUAL %
1941 - 1971	3,915,400	2.4
1971 - 2001	3,944,200	1.4

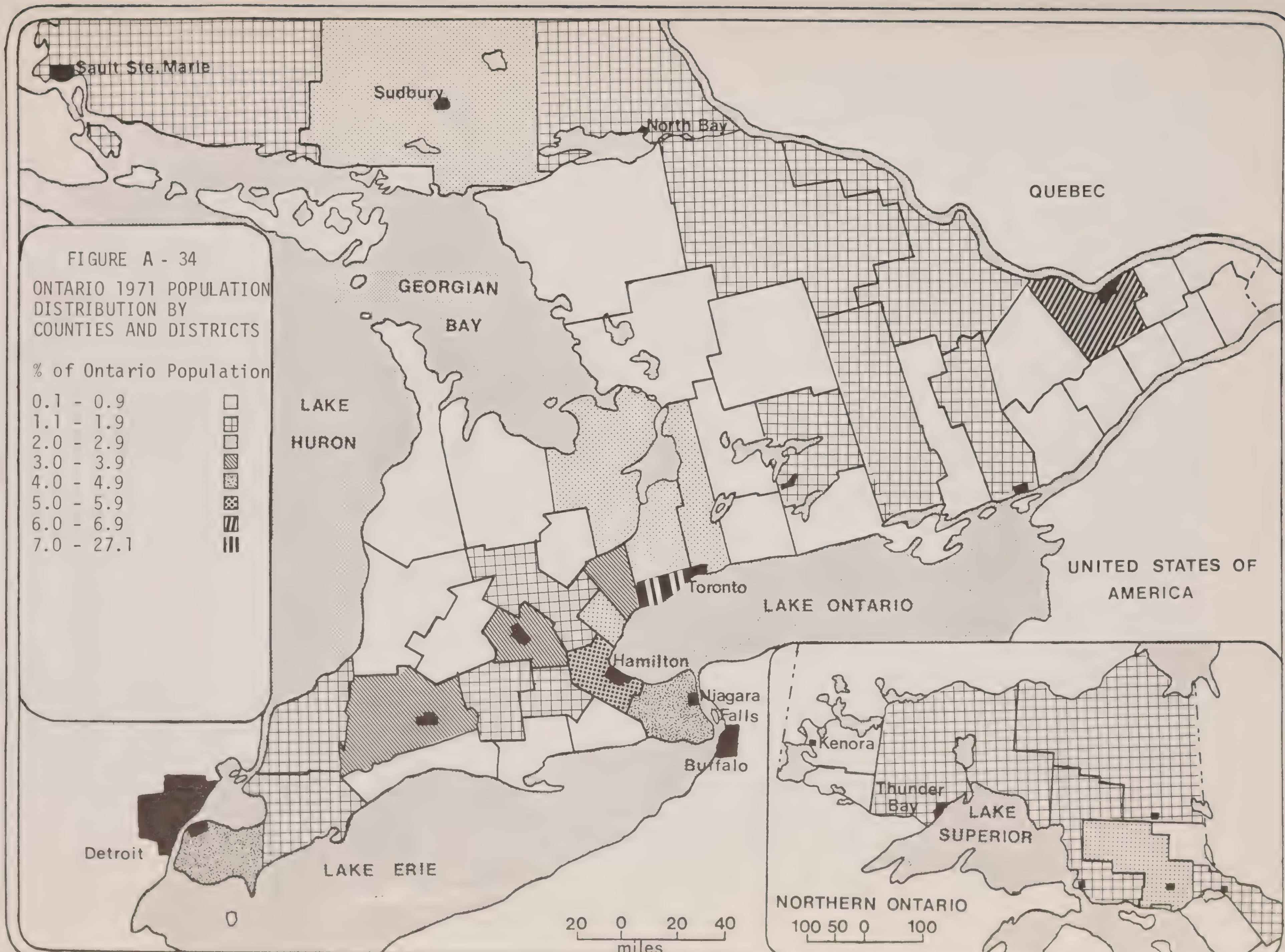

FIGURE A - 34

ONTARIO 1971 POPULATION DISTRIBUTION BY COUNTIES AND DISTRICTS

TABLE A - 49

POPULATION PROJECTION AND PERCENT SHARE BY PLANNING REGIONS, ONTARIO 1986 AND 2001

POPULATION

PLANNING REGION	1961	1971	1986		2001	
			ASSUMPTION "A"	ASSUMPTION "B"	ASSUMPTION "A"	ASSUMPTION "B"
CENTRAL*	3,542,700	4,644,900	6,072,200	6,193,600	7,414,000	7,745,300
SOUTHWESTERN	1,020,900	1,180,500	1,426,200	1,375,300	1,661,600	1,531,800
EASTERN	920,700	1,070,900	1,312,500	1,258,200	1,518,600	1,426,800
NORTHEASTERN	535,300	582,400	708,300	663,600	821,100	669,800
NORTHWESTERN	216,500	224,400	233,300	263,000	230,900	273,600
ONTARIO**	6,236,100	7,703,100	9,752,500	9,753,700	11,646,200	11,647,300

PERCENT SHARE

PLANNING REGION	1961	1971	1986		2001	
			ASSUMPTION "A"	ASSUMPTION "B"	ASSUMPTION "A"	ASSUMPTION "B"
CENTRAL*	56.8	60.3	62.3	63.5	63.7	66.5
SOUTHWESTERN	16.4	15.3	14.6	14.1	14.3	13.2
EASTERN	14.7	13.9	13.4	12.9	13.0	12.2
NORTHEASTERN	8.6	7.6	7.3	6.8	7.0	5.8
NORTHWESTERN	3.5	2.9	2.4	2.7	2.0	2.3
ONTARIO	100.0	100.0	100.0	100.0	100.0	100.0

* Includes COLUC Area

** The provincial total under each of the two assumptions should be identical. The slight differences were due to rounding of figures.

the remaining half derived from external migration. For some metropolitan areas (e.g., Ottawa and COLUC**) the proportion of growth due to the migration effect will be as high as 70 to 80 percent during 1986-2001. However, a number of the counties in the province, mainly those in northern and eastern Ontario, will continue to lose people through migration (Figure A-35).

4. Apart from the COLUC and the major metropolitan areas (except Hamilton), the growth rate of the rest of the province is expected to be only half of the provincial average. (Table A-50). However, in absolute terms, the population in the rural areas and the small centres (population less than 1,000) as a whole will continue to grow. During the next 30 years, about 1/2 million people will be added to the townships and small centres in southern Ontario (equivalent to about 50 percent increase from 1971).

In some areas within the COLUC area (e.g., Durham and Ontario) some of the population targets given in the COLUC task force report will be over 80 percent more than the trend projection.

i) Urban System.--Ontario is the most urbanized province with 82.4 percent of its population classified as urban in 1971. In the same year, 76.1 percent of Canada's population and 80.6 percent of Quebec's was similarly classed. The Economic Council of Canada predicts that over 80 percent of the country's population will be urban by 1980 and that about 60 percent of the population will be concentrated in 29 urban complexes, each with a population of at least 100,000.

If the 1961-1971 trend is maintained, about 90 percent of Ontario's population could be classified as urban by 1986, with the urban population growing at a faster rate than the total population (T.E.I.G.A., September/October, 1973, p. 8).

The concentration of Ontario population in the southern part of the province along the Windsor-Montreal corridor is expected to continue. "According to the trend, outside the COLUC area, the 2001 urban system in the rest of southern Ontario will not be significantly different from what

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**The Central Ontario Lakeshore Urban Complex, from a report by the same name prepared for the Advisory Committee on Urban and Regional Affairs, Ontario, 1974.

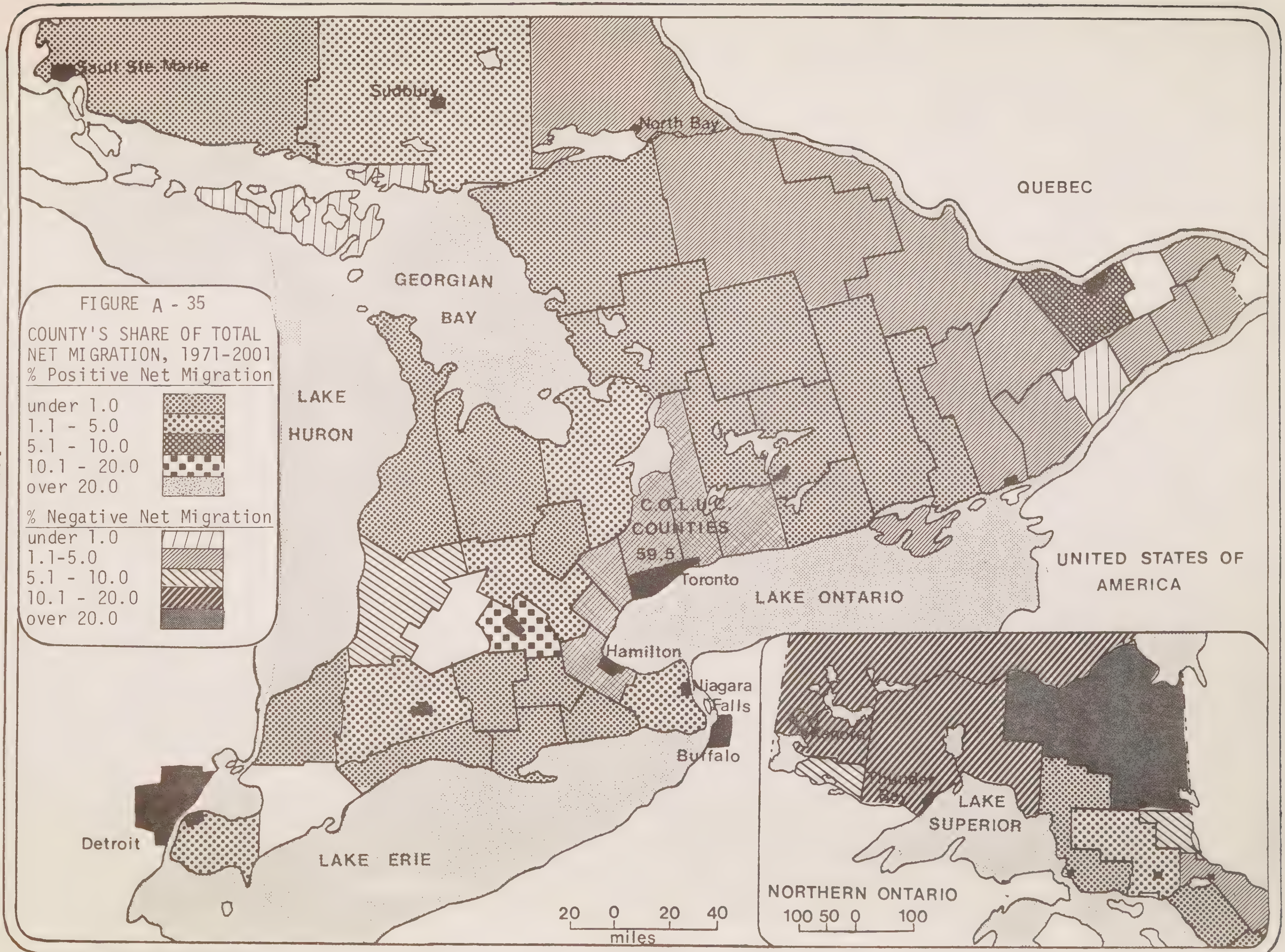
FIGURE A - 35
COUNTY'S SHARE OF TOTAL NET MIGRATION, 1971-2001
% Positive Net Migration
under 1.0
1.1 - 5.0
5.1 - 10.0
10.1 - 20.0
over 20.0
% Negative Net Migration
under 1.0
1.1-5.0
5.1 - 10.0
10.1 - 20.0
over 20.0
Sault Ste. Marie
Sudbury
North Bay
QUEBEC
GEORGIAN BAY
LAKE HURON
C.O.L.U.C. COUNTIES 59.5
Toronto
UNITED STATES OF AMERICA
LAKE ONTARIO
Hamilton
Niagara Falls
Buffalo
Detroit
LAKE ERIE
LAKE SUPERIOR
NORTHERN ONTARIO
100 50 0 100
20 0 20 40
miles

TABLE A - 50

POPULATION CHANGE BY COLUC AND MAJOR CENSUS METROPOLITAN AREAS, (CMA) ONTARIO, 1971-2001

AREA	1971 POPULATION		2001 POPULATION	POPULATION GROWTH 1971-2001		ANNUAL CHANGE (%)
	NO.	% OF PROVINCE		NO.	% OF PROVINCE	
COLUC (SIX COUNTIES, ESSENTIALLY TORONTO AND HAMILTON CMA'S	3,347,600	43.5	5,407,100(A) 5,881,900(B)	2,059,500(A) 2,534,300(B)	52.2(A) 64.3(B)	1.6(A) 1.9(B)
KITCHENER CMA	226,800	2.9	437,500(A) 413,300(B)	210,700(A) 186,500(B)	5.3(A) 4.7(B)	2.2(A) 2.0(B)
LONDON CMA	286,000	3.7	459,000(A) 435,000(B)	173,000(A) 149,000(B)	4.4(A) 3.8(B)	1.6(A) 1.4(B)
WINDSOR CMA	258,600	3.4	409,600(A) 342,500(B)	151,000(A) 83,900(B)	3.8(A) 2.1(B)	1.5(A) 0.9(B)
OTTAWA CMA ONTARIO SECTION	453,300	5.9	791,200(A) 729,000(B)	337,900(A) 275,700(B)	8.6(A) 7.0(B)	1.9(A) 1.6(B)
TOTAL	4,572,300	59.4	7,504,400(A) 7,801,700(B)	2,932,100(A) 3,229,400(B)	74.4(A) 81.9(B)	1.7(A) 1.8(B)
REST OF ONTARIO	3,130,700	40.6	4,141,600(A) 3,844,300(B)	1,010,900(A) 713,600(B)	25.6(A) 18.1(B)	0.9(A) 0.7(B)
ONTARIO	7,703,000	100.0	11,646,000	3,943,000	100.0	1.4

NOTE: The six COLUC counties make up the entire Toronto and Hamilton CMA'S plus their fringes. In 1971, the population difference between the six COLUC counties and the Toronto and Hamilton CMA combined was only 221,000 (3,347,600 vs 3,126,600).

(A) - refer to Assumption A projection

(B) - refer to Assumption B projection

it is now" (T.E.I.G.A., October, 1975, p. 21). In contrast, inside the COLUC, the urban system will probably take on a new perspective (Figure A-36 and Table A-51).

> Through the initiation of the Toronto-Centred Region Concept, and recently the COLUC task force report, a system of towns and cities in the COLUC area has been called for and specified. A number of centres such as Mississauga and Oshawa/Whitby are expected to achieve metropolitan status by 2001, with a population exceeding 1/3 of a million people. Similarly, places such as Burlington, Erin Mills/Meadowvale, and Brampton/Bramalea will probably become major centres with population over 100,000.
>
> By 2001, there will be 8 centres in southern Ontario with a population exceeding one half million and 7 centres between 100,000 and 200,000 people. However, it is predicted there will be no centre east of Oshawa, other than Ottawa, with a population exceeding 100,000, even by 2001 (refer to Figure A-36). (T.E.I.G.A., October 1975, p. 22).

ii) <u>Impact of Regional Projects</u> (Figure A-37).--

> The population resulting from the three developments - the Nanticoke complex, Bruce Hydro and S.O.A.P. in Sarnia - will amount to a total of about 53,000 by 1980 and about 120,000 by 2001. Even if we assume the entire 120,000 people as extra growth, that is, over and above the projected trend, the amount only represents an additional 6 percent population increase in the entire southwestern part of the province west of the COLUC area during the next thirty years (this is equivalent to about 5 percent of the increase in the COLUC area). Thus, from the standpoint of the overall development impact in southwestern Ontario, the effect will not be as substantial as one might imagine.
>
> Except for the fact that a new town will be created near Jarvis (Townsend) and may eventually reach an ultimate size of about 80,000 (70,000 by 2001), the three projects discussed above will not alter the rest of the projected urban system based on trends; however, the relative developmental impact on a number of the smaller centres in the Nanticoke and Bruce areas could be quite substantial.
>
> Where the labour force will be drawn from will be influenced by a number of factors, including policy decisions by the government and the

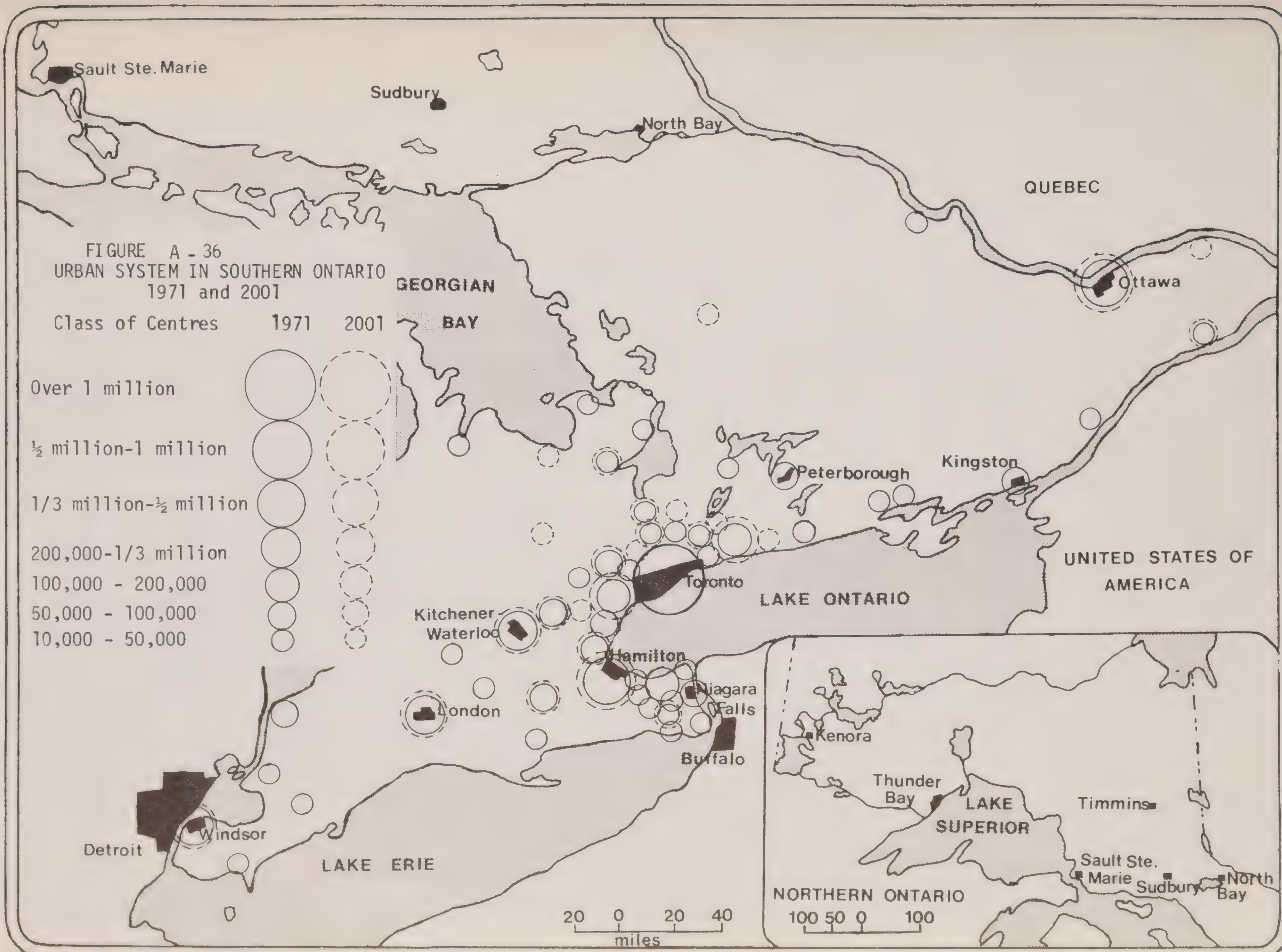

FIGURE A - 36
URBAN SYSTEM IN SOUTHERN ONTARIO
1971 and 2001

TABLE A - 51

DISTRIBUTION OF CENTRES BY SIZE IN THE URBAN SYSTEM OF ONTARIO, 1971 AND 2001

CLASS OF CENTRES[a]	1971 NO. OF CENTRES	1971 % OF PROVINCIAL POPULATION	2001 NO. OF CENTRES	2001 % OF PROVINCIAL POPULATION
OVER 1 MILLION	1(1)	27.3	1(1)	24.1
1/2 MILLION - 1 MILLION	none		2(1)	11.4
1/3 MILLION - 1/2 MILLION	2(1)[b]	10.5	5(2)	16.7
200,000 - 1/3 MILLION	3(0)	10.0	none	
100,000 - 200,000	3(2)	4.8	6(4)	7.8
50,000 - 100,000	9(3)	7.4	11(4)	5.8
10,000 - 50,000	32(7)	8.3	35(9)	7.1
1,000 - 10,000	147(26)	5.8	156(19)	4.5
ALL TOWNSHIPS AND CENTRES WITH POPULATION LESS THAN 1,000		15.4		14.5
NORTHERN ONTARIO CENTRES		10.5		8.1
ONTARIO		100.0		100.0

NOTE: 1) The classifications of centres were based on the Assumption A population projection and the RA allocation series for urban places within COLUC. With the exception of North Oakville, which would have 1,000 people under RA by year 2001, and 77,000 under RB, there is an insignificant difference between the urban systems under allocations RA and RB. The same statement can also be applied for the urban systems under the Assumptions A and B projections.

2) The figures in the brackets referred to the number of centres in that particular class within the COLUC area.

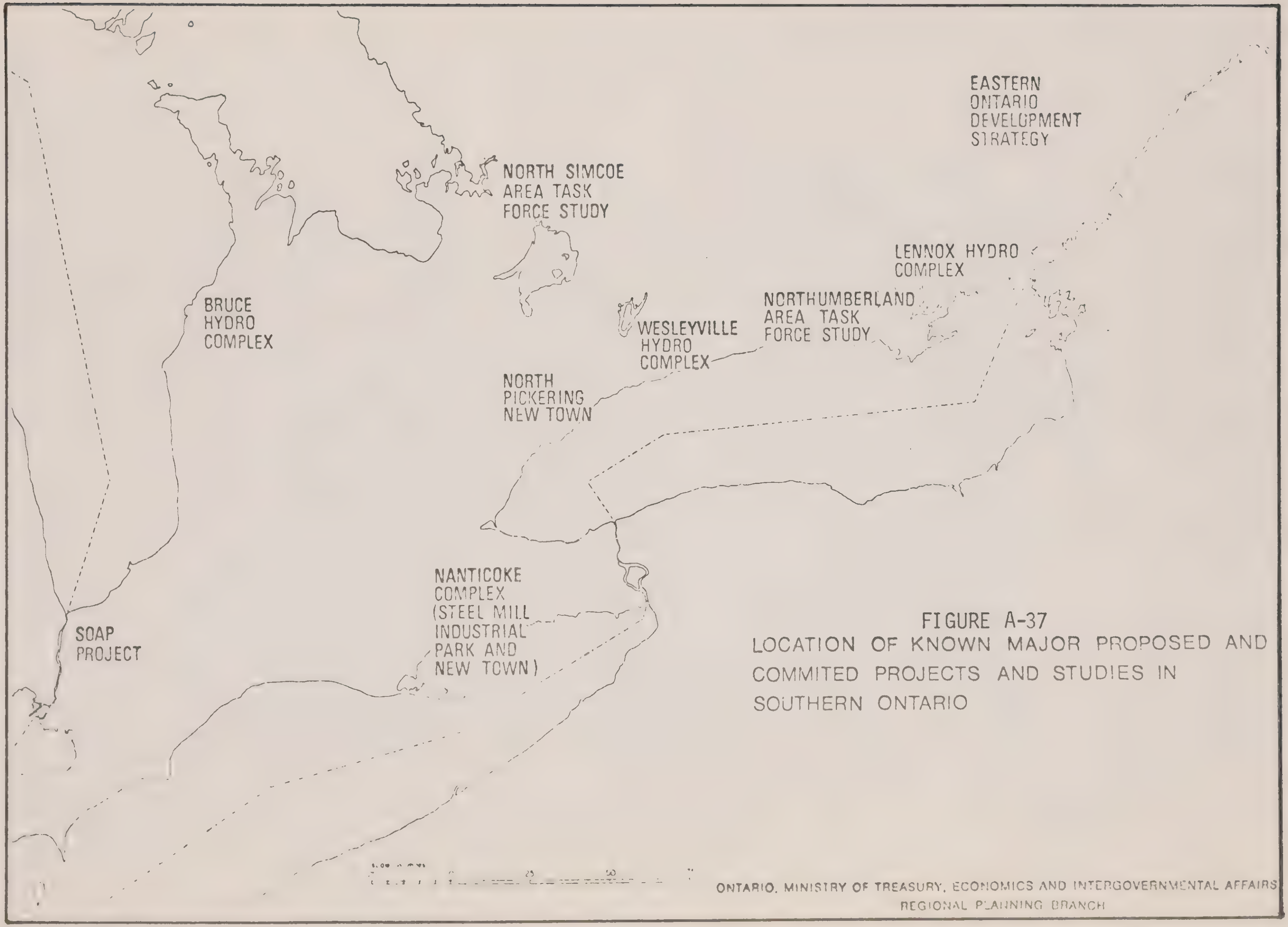

FIGURE A-37
LOCATION OF KNOWN MAJOR PROPOSED AND COMMITED PROJECTS AND STUDIES IN SOUTHERN ONTARIO

ONTARIO. MINISTRY OF TREASURY, ECONOMICS AND INTERGOVERNMENTAL AFFAIRS
REGIONAL PLANNING BRANCH

companies concerned, recruitment options, immigration policy, timing of the new towns, the nature of local development policies in the surrounding areas, etc. It is unlikely, however, that the projects will have any noticeable effect on the levels of trend population in other parts of the province (T.E.I.G.A., October, 1975, p. 8).

Table A -52 summarizes the probable population impact on various parts of Ontario as a result of demand for labour by these projects.

iii) Beyond 2001.--

It is unlikely that natural increase will approach zero before 2001 even if the effect of migration is excluded. If the fertility rate stabilizes at a value of 1.98 beyond 2001 and net migration is at a level of 50,000 per year, by about 2060 the provincial population will reach around 15 million (i.e., the maximum). In terms of the COLUC area, it would mean a maximum population of slightly over 7 million which is well within the limits when the urban system reaches its maturity as called for by the COLUC Task Force Report.

iv) Age Composition.--

Three distinctive changes are expected in the age composition of the future.

a) The population of Ontario as a whole will be somewhat older in the future than it has been in the recent past. This will be largely due to the aging of the people who made up the post-war baby boom, together with the recent decline in fertility rate.*

b) In certain parts of the province, there will be an actual reduction in the number of people in the younger groups (0 to 24). These areas include northern Ontario, the territory outside the major metropolitan areas in the Eastern and Northern Ontario Regions and, to a lesser extent, the Central Ontario Region (Tables A -54 and A-55). In relative terms, the largest reductions will occur in the Eastern Ontario Region outside the Ottawa area, followed by areas in the Southwestern Ontario Region beyond the metropolitan centres of London and Windsor. In the former area, some of the younger age groups may be reduced to 2/3 to 3/4 of their 1971 population level.

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*This point is illustrated in Table A -53 which traces the year at which a given age group will represent its largest share of the total population.

TABLE A-52

SUMMARY OF PROBABLE POPULATION IMPACT ON VARIOUS PARTS OF ONTARIO AS A RESULT OF DEMAND FOR LABOUR BY NANTICOKE, S.O.A.P. AND BRUCE HYDRO DEVELOPMENT PROJECTS

AREAS	SCENARIO
Northern and Eastern Ontario	- would probably induce some additional out-migration from these two regions,* but not much. - net effect might reduce the unemployment rate somewhat and accordingly the levels of projected trend population.
Areas within daily commuting distance of the projects (e.g. within a commuting radius of 30 to 40 minutes from the plant site).	- would experience an extra increase in population due to influx of workers attracted by the new work opportunities. - but the effect might be offset somewhat by the relocation of some existing industries or new firms which would otherwise be locating there.

* This assumption excludes the consideration of any additional government development effort in Eastern and Northern Ontario.

TABLE A-52, continued

SUMMARY OF PROBABLE POPULATION IMPACT ON VARIOUS PARTS OF ONTARIO AS A RESULT OF DEMAND FOR LABOUR BY NANTICOKE, S.O.A.P. AND BRUCE HYDRO DEVELOPMENT PROJECTS

AREAS	SCENARIO
Areas just outside the immediate daily commuting zone. For the Nanticoke project, they would embrace such centres as Woodstock, Brantford, Welland, London, Hamilton and Kitchener/Waterloo. For Bruce Hydro, include Owen Sound and other centres, and for S.O.A.P. include Wallaceburg, Chatham, etc.	- situation would be very fluid and unpredictable, - probably would have some additional longer distance commuters living in these areas, - such factors as housing, level of interconnected transportation services and community facilities would have a great influence on eventual impact. - loss of population might be offset by some increase in new industries attracted by these projects, because these areas are just outside the highly competitive zones, - projected Dofasco and moderate STELCO expansion in Hamilton facilities up to end of 70's would probably enable Hamilton to achieve its level of trend projection. But it is doubtful it would reach the population targets called for by the COLUC Task Force unless incentives are provided.

TABLE A -52, continued

SUMMARY OF PROBABLE POPULATION IMPACT ON VARIOUS PARTS OF ONTARIO AS A RESULT OF DEMAND FOR LABOUR BY NANTICOKE, S.O.A.P. AND BRUCE HYDRO DEVELOPMENT PROJECTS

AREAS	SCENARIO
Toronto and vicinity	- the impact on population level would not be significant because of the large increase expected through "normal" population growth.
Areas outside Ontario	- net migrations to Ontario would probably rise slightly beyond the 50,000 per year level assumed in the trend projection. But the future provincial and national economy together with the kind of immigration policy pursued would be a major factor.

TABLE A-53

PERCENT OF DISTRIBUTION OF POPULATION BY MAJOR AGE GROUPS, ONTARIO, 1941 TO 2001

MAJOR AGE GROUPS	% DISTRIBUTION					
	1941	1951	1961	1971	1986	2001
0 - 4	7.9	11.2	11.9	8.3	8.7	7.1
5 - 20	25.4	22.7	27.3	29.6	22.9	22.6
20 - 24	8.6	7.7	6.2	8.8	8.6	7.4
25 - 44	29.6	30.0	28.1	25.9	31.7	30.0
45 - 64	20.5	19.8	18.4	19.1	19.0	22.7
65 AND OVER	8.0	8.6	8.1	8.3	9.1	10.2
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0

SOURCES: Statistics Canada.
Ministry of Treasury, Economics and Intergovernmental Affairs, Ontario

TABLE A- 54

POPULATION CHANGE BY 0-4 AND 5-19 AGE GROUPS FOR SELECTED METROPOLITAN COUNTIES AND PLANNING REGIONS, ASSUMPTION "A" POPULATION PROJECTIONS 1971-1986 AND 1971-2001

TIME PERIODS	SIX COLUC COUNTIES (TORONTO/ HAMILTON)	WATERLOO COUNTIES (KITCHENER/ WATERLOO)	REST OF CENTRAL ONTARIO REGION	ESSEX COUNTIES (WINDSOR)	MIDDLESEX COUNTY (LONDON)	REST OF SOUTHWESTERN ONTARIO REGION	OTTAWA CARLETON (OTTAWA)	REST OF EASTERN ONTARIO REGION	NORTHERN ONTARIO REGION
0-14 AGE GROUP									
1971-1986	91,000/33%	10,200/43%	38,600/ 51%	12,400/53%	6,300/24%	12,400/ 26%	17,700/48%	13,400/ 28%	20,600/ 28%
1986-2001	12,200/ 5%	4,100/17%	-8,200/-11%	1,100/ 5%	-700/-3%	-9,000/-19%	0/0	-12,200/-26%	-12,800/-17%
1971-2001	103,200/38%	14,300/60%	30,400/ 40%	13,500/58%	5,600/21%	3,400/ 7%	17,700/48%	1,200/ 2%	7,800/ 11%
5-19 AGE GROUP									
1971-1986	72,600/ 8%	15,800/21%	-3,700/- 1%	4,700/ 6%	100/≈0%	-32,900/-18%	-4,200/-3%	-44,000/-23%	-43,000/-16%
1986-2001	178,500/19%	22,500/30%	64,600/ 22%	23,422/26%	11,400/12%	24,900/ 14%	29,000/21%	19,300/ 10%	-1,700/- 1%
1971-2001	251,100/27%	38,300/51%	60,900/ 21%	28,122/34%	11,500/12%	-8,000/- 4%	24,800/18%	-24,700/-13%	-44,700/-17%
20-24 AGE GROUP									
1971-1986	5,900/19%	6,000/24%	40,200/ 54%	7,200/27%	4,900/18%	15,300/ 34%	8,600/19%	13,000/ 27%	20,100/ 29%
1986-2001	30,700/10%	5,900/24%	-1,000/- 1%	4,600/17%	400/ 1%	-5,700/-13%	6,000/13%	-7,800/-16%	-6,800/-10%
1971-2001	89,700/29%	11,900/48%	39,200/ 53%	11,800/44%	5,300/19%	9,600/ 21%	14,600/32%	5,200/ 11%	13,300/ 19%

NOTE: For more detailed information, see Appendixes G(1) to G(4)

Absolute change

XXX/XX% ←Absolute change expressed as a percentage of the 1971 population level for that particular age group.

TABLE A - 55

POPULATION CHANGE BY 0-4 AND 5-19 AGE GROUPS FOR SELECTED METROPOLITAN COUNTIES AND PLANNING REGIONS, ASSUMPTION "B" POPULATION PROJECTION, 1971 - 1986, 1986 - 2001 AND 1971 - 2001

TIME PERIODS	SIX COLUC COUNTIES (TORONTO/ HAMILTON)	WATERLOO COUNTIES (KITCHENER/ WATERLOO)	REST OF CENTRAL ONTARIO REGION	ESSEX COUNTIES (WINDSOR)	MIDDLESEX COUNTY (LONDON)	REST OF SOUTHWESTERN ONTARIO REGION	OTTAWA CARLETON (OTTAWA)	REST OF EASTERN ONTARIO REGION	NORTHERN ONTARIO REGION
0-14 AGE GROUP									
1971-1986	107,200/39%	10,000/43%	36,500/ 49%	9,400/35%	5,400/ 23%	11,800/ 25%	14,300/39%	11,600/ 25%	18,700/ 25%
1986-2001	31,200/11%	2,400/10%	-10,700/-14%	-2,500/-9%	-600/ -3%	-11,000/-23%	3,600/10%	-15,100/-32%	-26,600/-36%
1971-2001	138,400/50%	12,400/53%	25,800/ 35%	6,900/26%	4,800/-20%	800/ 2%	17,900/49%	-3,500/ -7%	-7,900/-11%
5-19 AGE GROUP									
1971-1986	109,200/12%	15,200/20%	-14,000/ -5%	-2,700/-3%	-2,400/ -3%	-35,400/-19%	-4,100/-3%	-48,100/-25%	-46,400/-17%
1986-2001	222,700/24%	16,600/22%	64,800/ 22%	10,600/11%	11,500/ 14%	18,100/ 10%	37,400/27%	6,000/ 3%	-12,900/ -5%
1971-2001	331,900/36%	31,800/42%	50,800/ 17%	7,900/ 8%	9,100/ 11%	-17,300/ -9%	33,300/24%	-42,100/-22%	-59,300/-22%
20-24 AGE GROUP									
1971-1986	75,200/25%	6,000/24%	36,400/ 49%	4,700/17%	3,600/ 14%	14,600/ 32%	5,600/12%	11,500/ 24%	19,100/ 28%
1986-2001	48,900/16%	4,000/16%	-6,500/ -9%	700/ 3%	900/ 3%	-8,200/-18%	9,500/21%	-13,900/-29%	-18,200/-26%
1971-2001	124,100/41%	10,000/40%	29,900/ 40%	5,400/20%	4,500/ 17%	6,400/ 14%	15,100/33%	-2,400/ -5%	900/ 2%

NOTE:

Absolute change

XXX/XX% ←Absolute change expressed as a percentage of the 1971 population levels.

c) The differences in age structure in various parts of the province will further decrease. As can be seen from the age structures in various parts of the province (shown in Table A-56), in 1951, eleven major age groups deviated by more than two percentage points from the provincial average. According to the same criteria, by 1971 there were only eight deviant age groups, and by 2001, it is expected to be reduced to three. Indeed, with the exception of Essex County and Northern Ontario, by 2001 there will be very little relative difference in age structure in various parts of the province.

d) The differences in age structure associated with a depressed region versus a fast-growing area will become less of a development issue in the future. One of the main issues in the development of a depressed region lies in its age structure. The population of a depressed region generally includes a higher proportion of the very young and very old than a fast-growing area, because its middle age groups--its working population--have moved out in large numbers. To assess the significance of this problem, the age structure of the 17 counties which showed net migration losses for the two consecutive periods 1951-1961 and 1961-1971 was compared with those of the 12 counties with net migration gains for the same two periods (for specific counties, see Volume I, Ontario's Changing Population, T.E.I.G.A., October 1975, pp. 26-29). The results suggest a number of interesting conclusions.

   - In 1971, about 10.5 percent of the people of any county which experienced a net migration loss were over 65, while 41.6 percent were under 20. In contrast, in counties with a net migration gain, only 8.5 percent of the people were over 65, while 38.8 percent were under 20. These differences are statistically significant based on the statistical test of differences of means.
   - By 2001, the picture will be somewhat different. First, the proportion of people of working age (20-44) in the counties with net migration loss will exceed that of the counties with net migration gain. Secondly, the counties with net migration loss will have a lower proportion of the older age groups (45 and over) than the counties with migration gain. Perhaps one of the main reasons for this change in the relative

TABLE A-56

PERCENTAGE DISTRIBUTION OF POPULATION BY MAJOR AGE GROUPS,
MAJOR CENSUS METROPOLITAN AREAS AND REGIONS,
1951, 1971 AND 2001

AGE GROUPS	OTTAWA/ CARLETON (OTTAWA)	REST OF EASTERN ONTARIO REGION	COLUC COUNTIES*	WATERLOO KITCHENER/ (WATERLOO)	REST OF CENTRAL ONTARIO REGION	ESSEX (WINDSOR)	MIDDLESEX (LONDON)	REST OF SOUTHWESTERN ONTARIO REGION	NORTHERN ONTARIO	ONTARIO PROVINCIAL AVERAGE
1951										
0 - 4	11.6	12.1	10.0	11.4	11.4	11.8	10.8	11.3	13.2(H)	11.2
5 - 19	21.8	25.9(H)	19.4(L)	22.0	24.0	23.6	20.5(L)	23.7	27.5(H)	22.7
20 - 24	7.8	7.2	8.0	8.5	7.2	8.0	7.6	7.0	7.7	7.7
25 - 44	31.8	27.2(L)	32.4(H)	30.3	28.7	29.2	30.6	27.2(L)	29.3	30.0
45 - 64	19.1	17.9	21.4	19.4	19.4	20.6	20.2	19.9	16.7(L)	19.8
65 +	7.9	9.7	8.8	8.4	9.3	6.8	10.3	10.9(H)	5.6(L)	8.6
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
1971										
0 - 4	7.8	7.9	8.2	9.3	8.3	8.7	8.3	8.1	9.3	8.3
5 - 19	29.8	30.8	27.6(L)	29.5	30.9	30.4	29.2	30.8	33.8(H)	29.6
20 - 24	9.7	9.2	9.1	9.8	7.9	8.6	9.4	7.6	8.5	8.8
25 - 44	26.4	23.2(L)	28.2(H)	26.2	23.9(L)	23.9(L)	25.6	22.4(L)	24.0	25.9
45 - 64	19.2	19.3	19.2	17.6	19.5	18.8	18.9	20.0	17.7	19.1
65 +	7.1	9.6	7.7	7.6	9.5	9.6	8.6	11.1(H)	6.7	8.3
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
2001										
0 - 4	6.7	6.8	7.0	7.9	7.1	8.2	6.6	7.0	7.9	7.1
5 - 19	21.5	23.5	21.4	23.5	24.3	24.7(H)	21.5	23.6	25.5(H)	22.6
20 - 24	7.5	7.5	7.3	7.7	7.4	7.9	7.3	7.4	7.8	7.4
25 - 44	30.4	29.6	30.2	29.6	29.3	29.0	30.2	29.6	29.5	30.0
45 - 64	23.8	22.0	23.5	22.2	21.8	20.9	23.7	21.6	20.5(L)	22.7
65 +	10.1	10.6	10.6	9.1	10.1	9.3	10.7	10.8	9.0	10.2
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

H = Higher end of the scale, exceed the provincial average by 2 or more percentage points.
L = Lower end of the scale, less than the provincial average by 2 or more percentage points.
* The COLUC counties include Wentworth, Halton, Peel, Metro Toronto/York Ontario and Durham. These six counties embody essentially the Hamilton and the Toronto Metropolitan areas.

> concentration of the age groups is that the characteristic age distribution of a county with migration loss is already stablilized in the depressed regions, while the distribution in the fast-growing areas will continue to change as the bulk of the people who made up the post-war baby boom grow older. It should be pointed out that the counties with migration loss will continue to have a much larger proportion of their population in the younger age groups (0-19) than the counties with migration gain.

c. Family Size

The birthrate will likely decline steadily and substantially during the next three decades. "In fact, by the early 1980's the average family size will probably have been reduced to two children; this state of affairs is almost a certainty by 1990" (Dyck and Emery, 1970, p. 63). Major factors contributing to this reduction in birthrate are:

i) an increase in the rate of male sterilization,

ii) an increase in the rate of rejection by women of the option of bearing children, and

iii) the increase in trends towards a variety of marriage forms (e.g., plural marriages and trial marriages which inhibit the choice of bearing children).

d. Labour Force

The size of the labour force is defined by the size of the working age population and the participation rates. The "working age population" generally refers to people 14 or 15 years of age and over.

> The size of the working age population is determined mainly by fertility and migration, whereas the participation rate is influenced by a host of complex factors, such as economic condition, women's aspirations, early retirement, and attitudes towards education, work and leisure. A number of these factors are fairly volatile and their impact on the participation

> rate might change over time.* This consideration should be kept in mind when viewing the projected information. On the basis of the projected age composition shown in the previous section and projected participation rates, the labour force for Ontario as a whole, as well as for various parts of the province has been predicted for 1986 and 2001. The labour force will continue to grow faster than the population, but the rate of increase will slow down considerably, especially after 1986 (refer to Table A-57). (T.E.I.G.A., October, 1975, p. 30).

An increase in the size of the working age population rather than a higher participation rate is expected to account for the bulk of the labour force growth (Table A-58). Table A-59 indicates that the growth will be most notable in the female component which is expected to increase from about 28 percent of the total in 1961 to 40 percent in 2001. Moreover, the labour force as a whole is likely to be slightly older in the future (Table A-60 and Figures A-38 and A-39).

The labour force in the metropolitan areas will expand at a much faster rate than in the areas beyond. This is a result of higher participation rate and population increase (Tables A-61 and A-62). Finally, in the future the labour force will be well educated and highly skilled by 1985; 23 percent will have some university education (Spearin, February, 1976, p. 2). As the labour force becomes more educated the demand for skilled trades will increase as will competition for middle management positions. In addition, the demand for more job satisfaction becomes a more important factor with education.

Employment growth for Ontario could, on the average, be higher in the 1970's. In subsequent years little difference in the rates is expected (T.E.I.G.A., July/August, 1973, p. 3).

With these patterns emerging for the labour force and employment, it is expected that the unemployment rate in Ontario will be a problem until the late 1970's and then labour shortages may intensify.

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*For example, recent information indicated that in spite of a lowering in retirement age requirement people may still stay in the labour force or merely semi-retire because of inflation and other factors. Therefore, we assumed that the 55 and over male participation rates would increase slightly. However, the situation could well change if there is a reverse in the economic situation or change in social attitude.

TABLE A-57

COMPARISON OF CHANGE IN LABOUR FORCE AND POPULATION, ONTARIO, 1953 - 2001

SIZE					
ITEM	1953	1961	1971	1986	2001
LABOUR FORCE	1,948,000	2,401,000	3,249,000	4,856,800	6,155,800
POPULATION (ALL AGES)	4,920,500	6,236,100	7,703,100	9,753,700	11,646,200
POPULATION (AGE 15 AND OVER)	3,542,800*	4,228,300	5,494,600	7,352,500	9,058,200
ANNUAL RATE OF CHANGE (%)					
ITEM	1953-1961	1961-1971	1971-1986	1986-2001	1971-2001
LABOUR FORCE	2.6	3.1	2.7	1.6	2.2
POPULATION (ALL AGES)	3.0	2.2	1.6	1.2	1.4
POPULATION (AGE 15 AND OVER)	2.2	2.6	2.0	1.4	1.7

* Estimated on the basis of 1951 and 1956 age distribution.

TABLE A - 58

PROPORTIONS OF GROWTH IN LABOUR FORCE DUE TO
CHANGE IN THE SIZE OF WORKING AGE POPULATION AND PARTICIPATION RATES,
ONTARIO, 1971 - 1986, 1986 - 2001 AND 1971 -2001

EFFECTS DUE TO CHANGE IN	1971-1986		1986-2001		1971-2001	
	NO.	%	NO.	%	NO.	%
SIZE OF WORKING AGE POPULATION*	1,077,600	67	1,003,400	77	2,081,000	72
PARTICIPATE RATES	530,200	33	295,600	23	825,800	28
TOTAL	1,607,800	100	1,299,000	100	2,906,800	100

* The working age population age refers to people 14 or 15 years of age and over.

TABLE A- 59

PERCENT DISTRIBUTION OF LABOUR FORCE BY SEX, ONTARIO
1971, 1986 AND 2001

	DISTRIBUTION OF LABOUR FORCE (%)			
SEX	1961	1971	1986	2001
MALE	72	66	61	60
FEMALE	28	34	39	40
TOTAL	100	100	100	100

TABLE A - 60

PERCENT DISTRIBUTION OF LABOUR FORCE
BY AGE GROUPS, ONTARIO,
1971, 1986 AND 2001

AGE GROUP	PERCENT DISTRIBUTION		
	1971	1986	2001
15-24	22.8	19.9	19.0
25-34	22.8	27.8	21.5
35-44	21.0	23.3	25.2
45-55	18.4	16.5	21.8
55 AND OVER	15.0	12.5	12.5
TOTAL	100.0	100.0	100.0

FIGURE A-38

AGE DISTRIBUTION OF THE ONTARIO LABOUR FORCE

1971 AND LOW PROJECTIONS 1976, 1981, 1986, 1991

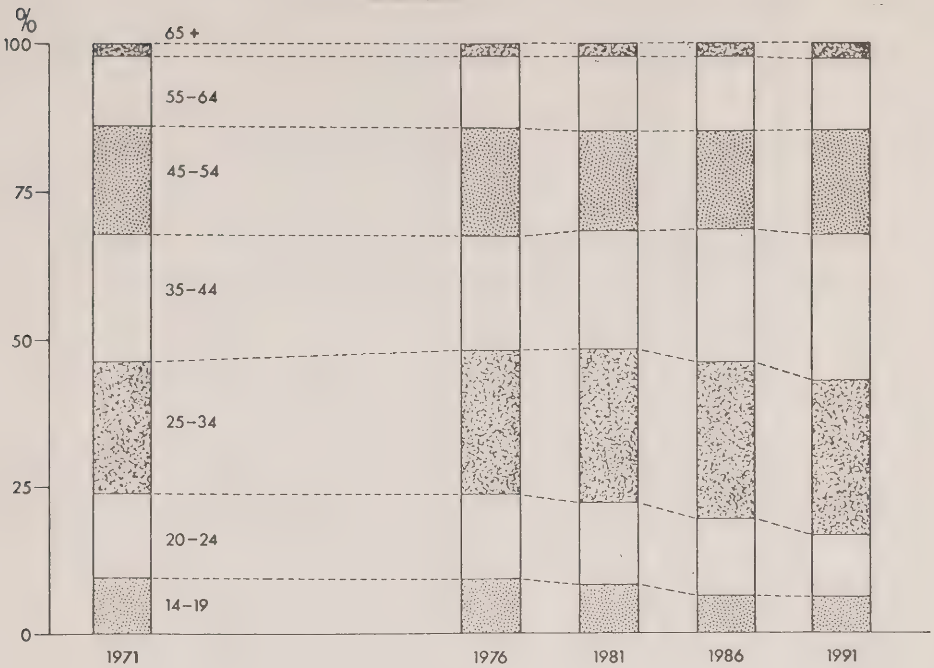
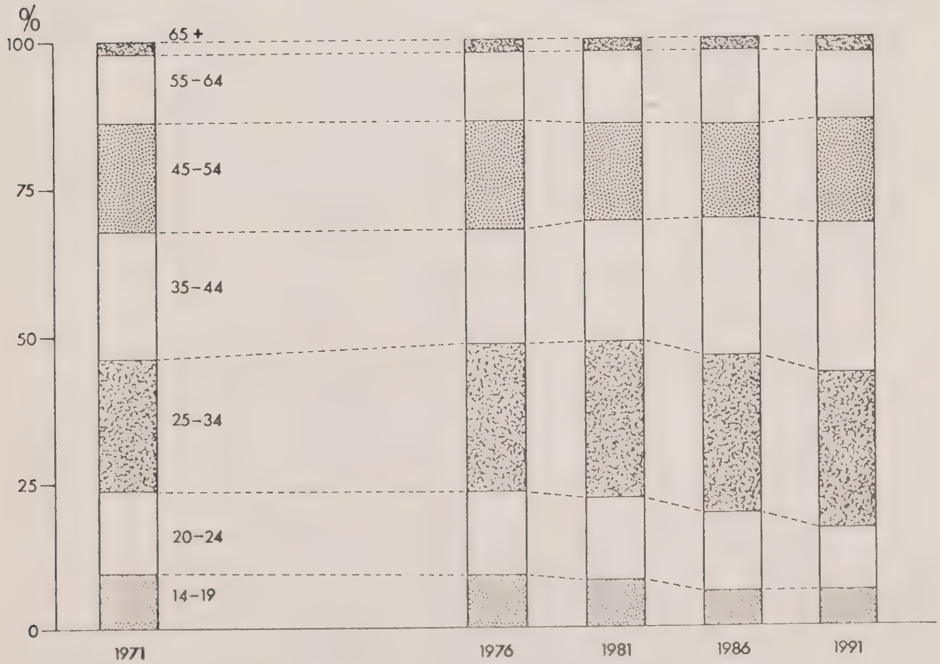


FIGURE A-39

AGE DISTRIBUTION OF THE ONTARIO LABOUR FORCE

1971 AND HIGH PROJECTIONS 1976, 1981, 1986, 1991



Source: The Labour Force Survey, 1971 (Special Tabulation) Statistics Canada
Projections by Ministry of Treasury, Economics and Intergovernmental Affairs.

TABLE A.- 61

CHANGE IN LABOUR FORCE BY MAJOR METROPOLITAN AREAS AND OTHER PARTS OF THE PROVINCE BASED ON ASSUMPTION "A" POPULATION PROJECTION, 1971 - 1986, 1986 - 2001 AND 1971 - 2001

AREA	1971 - 1986				1986 - 2001				1971 - 2001			
	CHANGE IN LABOUR FORCE		CHANGE IN POPULATION (AGE 15 AND OVER)		CHANGE IN LABOUR FORCE		CHANGE IN POPULATION (AGE 15 AND OVER)		CHANGE IN LABOUR FORCE		CHANGE IN POPULATION (AGE 15 AND OVER)	
	NO.	%	NO.	%	NO.	%	NO.	%	NO.	%	NO.	%
COLUC COUNTIES (TORONTO/HAMILTON)	819,500	47	931,000	38	659,000	28	889,000	26	1,478,500	99	1,820,000	75
WATERLOO COUNTY (KITCHENER/WATERLOO)	78,600	61	90,300	50	75,500	39	97,700	36	154,100	136	188,000	105
REST OF CENTRAL ONTARIO REGION	187,200	38	233,500	31	161,800	27	212,800	22	349,000	83	446,300	60
OTTAWA/CARLETON (OTTAWA)	130,300	55	153,100	45	110,300	33	148,800	30	240,500	117	301,900	89
REST OF EASTERN ONTARIO REGION	71,300	25	79,300	19	43,900	15	51,500	10	115,200	50	130,800	31
MIDDLESEX COUNTY (LONDON)	64,100	45	73,800	36	51,900	28	68,600	25	116,000	95	142,400	70
ESSEX COUNTY (WINDSOR)	57,700	41	71,600	33	57,900	32	79,400	28	115,600	95	151,000	70
REST OF SOUTHWESTERN ONTARIO REGION	75,700	25	86,400	21	58,500	19	66,800	13	134,100	56	153,200	36
NORTHERN ONTARIO REGION	123,400	35	144,500	27	80,500	19	105,000	15	203,800	69	249,500	46
ONTARIO	1,607,800	42	1,863,500	35	1,299,300	27	1,719,600	23	2,906,800	89	3,583,100	65

TABLE A -62

CHANGE IN LABOUR FORCE BY MAJOR METROPOLITAN AREAS AND OTHER PARTS OF THE PROVINCE BASED ON ASSUMPTION "B" POPULATION PROJECTION, 1971 - 1986, 1986 - 2001 AND 1971 - 2001

AREA	1971 - 1986				1986 - 2001				1971 - 2001			
	CHANGE IN LABOUR FORCE		CHANGE IN POPULATION (AGE 15 AND OVER)		CHANGE IN LABOUR FORCE		CHANGE IN POPULATION (AGE 15 AND OVER)		CHANGE IN LABOUR FORCE		CHANGE IN POPULATION (AGE 15 AND OVER)	
	NO.	%	NO.	%	NO.	%	NO.	%	NO.	%	NO.	%
COLUC COUNTIES (TORONTO/HAMILTON)	900,500	60	1,058,100	44	825,900	34	1,134,900	32	1,726,400	115	2,193,000	90
WATERLOO COUNTY (KITCHENER/WATERLOO)	78,200	69	89,000	50	60,400	32	78,700	29	138,600	123	167,700	94
REST OF CENTRAL ONTARIO REGION	166,900	40	200,300	27	123,500	21	155,200	16	290,400	69	355,500	48
OTTAWA/CARLETON (OTTAWA)	111,600	54	125,200	37	93,300	29	127,500	27	204,900	100	252,700	74
REST OF EASTERN ONTARIO REGION	63,800	28	66,100	16	35,700	12	41,500	9	99,500	43	107,600	26
MIDDLESEX COUNTY (LONDON)	58,600	48	65,100	32	51,000	28	69,400	26	109,600	89	134,500	67
ESSEX COUNTY (WINDSOR)	44,700	37	50,100	23	31,600	19	40,600	15	76,300	63	90,700	42
REST OF SOUTHWESTERN ONTARIO REGION	72,300	30	78,700	19	41,000	13	43,500	9	113,300	47	122,200	29
NORTHERN ONTARIO REGION	118,300	40	133,600	25	32,500	8	34,100	5	150,800	51	167,700	31
ONTARIO	1,614,900	50	1,866,200	34	1,294,900	27	1,725,400	23	2,909,800	90	3,591,600	65

e. Immigration

In the area of immigration there is uncertainty in forecasting the future size of the population because changes in federal immigration policies have considerable ramifications at the provincial level. For example, in the last few years Toronto has been receiving an annual average of at least 40,000 immigrants (T.E.I.G.A., September/October, 1973, p. 11). As immigration becomes restricted, this would likely reduce the rate of population growth in the metropolitan Toronto area.

In the future, it is expected that immigration "will be considerably slowed and largely confined to skilled persons for non-European countries" (Spearin, February, 1976, p. 2). In the past, a major source of labour was immigrants from abroad. "Between 1951 and 1973, of the 143,000 workers entering the seven key construction trades in Canada (excluding Quebec) 75 percent were immigrants from abroad" (T.E.I.G.A., October, 1975, p. 57). But the number of immigrants in the blue-collar categories--generally the major component of industrial workers--is declining compared with white-collar and professional workers. This trend occurs in response to the present immigration evaluation system which tends to place greater emphasis on such considerations as education.

These restrictions are expected to have a marked effect on population growth in larger Ontario cities since the majority of immigrants settle in urban areas where jobs and housing are more likely to be found. Population increases attributable to immigration will have repercussions on levels of employment and the labour force. If immigration is restricted largely to skilled persons, immigration can no longer be regarded as a source of labour to fill low status jobs.

f. Implications for Tourism

The absolute growth in, and location and composition of population are each key factors in the development of tourism. While these variables will certainly affect the consumption patterns and the demand for tourism, this discussion will concentrate largely on the ability of the population to supply the necessary <u>support services</u> that will be required for future tourism development.

The predicted continuous growth of population implies that there will

be a larger pool of human resources available to support tourism development. However, it is the spatial distribution and composition of the population that will impact substantially upon the feasibility of tourism development throughout the province.

The imbalance in the spatial distribution of the population is expected to become more extreme in the future; most of the population growth will be concentrated in the large urban complexes. In fact, it is forecast that 90 percent of the provincial population will, by the year 2001, be located along the Windsor-Montreal axis. Predictions indicate that the large metropolitan areas (except Hamilton) will increase twice as rapidly as the remainder of the Province (T.E.I.G.A., October, 1975, p. 70).

The development and maintenance of cultural, historical and man-made attractions of the magnitude that will draw large volumes of visitors over long distances, requires a large indigenous population to make such opportunities economically viable. For these reasons, the majority of the provincially significant attractions and events are currently clustered in or near the large urban centres in southern Ontario. Those that have been developed in less populated areas of the Province (northern and eastern Ontario, except Ottawa), have been developed largely because a vast amount of public funding was made available for their development and maintenance. Unless such public intervention continues to occur to offset regional disparity (this is unlikely in view of the current economic situation and the budgetary concern of government), the gravitation of the population to southern Ontario implies that in future major developments will continue to be concentrated in the southern part of the Province.

The level of tourism-related services is currently also higher in southern Ontario than in the northern and eastern sections. This again is a reflection of the population concentration in major southern urban centres. The service centres in southern Ontario offer more diversified and more specialized goods and services than their counterparts in northern and eastern Ontario. In southern centres, wider choice is available for goods and services (accommodation, dining, entertainment, transportation and shopping) supplied directly to tourists. In addition, more specialized

goods and services are supplied. A larger range of goods and services for the tourist industry also exists in southern Ontario. Again, the expected population losses predicted in northern and eastern Ontario give an indication that these spatial imbalances in the level and location of tourism-related services will potentially increase in the future.

Tourism is a labour intensive industry. In Ontario, a large share of the labour needed by the tourist industry is of the part time, seasonal and low status variety. Changes in the composition of the labour force have significant implications for the labour resources required by the tourism industry.

The labour force is becoming increasingly more educated. As the demand for more job satisfaction grows, the low skill, low status jobs will be affected evenmore. In the past, these jobs were filled by women, pensioners, retirees or immigrants. However, women are becoming more educated, giving up the option to bear children, thus reducing family size, and are entering the labour force on a full-time basis. They will be less satisfied with low skill, seasonal or part-time employment and, therefore, the retention of low wage female help may become difficult as early as 1986 (L. J. D'Amore and Associates Ltd., January, 1976, p. 7). There will be a greater number of women in hospitality career programs and more women in managerial and executive positions.

The current immigration policy which encourages skilled and professional people rather than labourers to immigrate is expected to be continued in the future. This indicates that the tourist industry cannot look to immigrants to fill the low skill jobs. Perhaps contract immigrant labour may provide the solution.

Labour shortages may occur for other reasons as well. While unemployment will be a problem until the late 1970's, the growth rate for employment and for the labour force are expected to parallel at that time and subsequently, labour shortages may intensify. There is a shortage of labour outside of urban areas and with the predicted acceleration of urbanization the shortage of labour in rural areas may be a critical factor in the growth of tourism.

Finally, there is difficulty in obtaining suitable managerial and

skilled personnel with knowledge and experience in the tourism field. Although the labour force is becoming more educated, "education in the hospitality and tourism related industries is not keeping pace with the demands for a qualified labour force. This shortage of qualified labour which has in the past deterred certain types of capital investment in tourism, may continue to 1986" (L. J. D'Amore and Associates, January, 1976, p. 15).

g. Historical/Cultural Themes

As has already been indicated, people are important to tourism as a market and as the human resources which provide tourism related services. Tourism begins, however, with attractions and events that provide the lure to motivate visitation. As well, people also draw people; visiting friends and relatives is the motivating force which induces much travel. The majority of visitors to cottages, resorts or campgrounds seek a social experience in a certain type of environment; and people travel to experience different or foreign lifestyles and cultures or to examine the historical foundations of a population. Population, then, can be a factor which motivates tourism and which offers considerable potential for future development and promotion of the tourism plant.

i) Ethnic/Cultural Themes.--Ontario appeals to the United States and overseas countries because it has a foreign image. The population in Ontario can be described as multi-cultural; a blend of people of a variety of ethnic origins. In certain areas of the province there are ethnic concentrations that have retained their cultural identities, thereby, creating in those areas, a living environment or atmosphere which has tremendous appeal to persons outside of the region.

The tangible evidence of such ethnic concentrations include the architectural style of buildings and other structures, costumes, food, arts and crafts and even transportation modes. In many areas, attractions and events have been developed to package these cultural elements in order to encourage tourism visitation. Examples are described in the attractions and events section of this appendix (Section 3). These include Oktoberfest and the Kitchener's Farmers Market which find their basis in the German population of the area; the Metro Toronto Caravan which features international food, entertainment and handcrafted

souvenirs; the Indian Village and Six Nation's Indian Pageant at Brantford; the St. Catharines Folk Art Festival; the Miner's Festival at Cobalt; the Manitoulin Indian Pow Wow; and a multitude of others.

There is a tremendous undeveloped potential for increasing tourist visitation to Ontario through the development of ethnic/cultural themes. This does not necessarily imply that major attractions and events must be developed in areas of ethnic concentrations. The cultural atmosphere can be utilized giving a unique flavour to recreational experiences that are available in a number of locations.

Figure A-40 indicates where concentrations of populations of various ethnic origins exceed the provincial average by relatively large percentages. The origins and locations of ethnic populations that form the basis for cultural themes are tabulated below:

a) French - (Essex, Kent, Sudbury, Nipissing, Ottawa-Carleton, Russell, Stormont, Glengarry, Timiskaming, Cochrane, Thunder Bay);
b) Italians - (Niagara, Hamilton-Wentworth, Metropolitan Toronto, Algoma);
c) German - (Kitchener/Waterloo);
d) Polish - (Niagara, Hamilton-Wentworth, Essex, Kitchener/Waterloo, Halton, Metropolitan Toronto, Renfrew, Thunder Bay);
e) Ukrainian - (Niagara, Hamilton-Wentworth, Essex, Metropolitan Toronto, Thunder Bay);
f) Netherlands - (small percentage per region but conglomerate creates a centralized significant population in Kent, Lambton, Middlesex, Oxford, Waterloo, Wellington, Hamilton-Wentworth, Niagara, Halton, Peel, York, Metropolitan Toronto, Simcoe, Durham);
g) Native Indian - (Kenora, Thunder Bay, Rainy River, Cochrane, Algoma, Manitoulin, Lambton, Middlesex, Brant, Hamilton-Wentworth, Metropolitan Toronto);
h) Chinese - (Metropolitan Toronto);
i) West Indian - (Metropolitan Toronto); and
j) Finnish - (Thunder Bay).

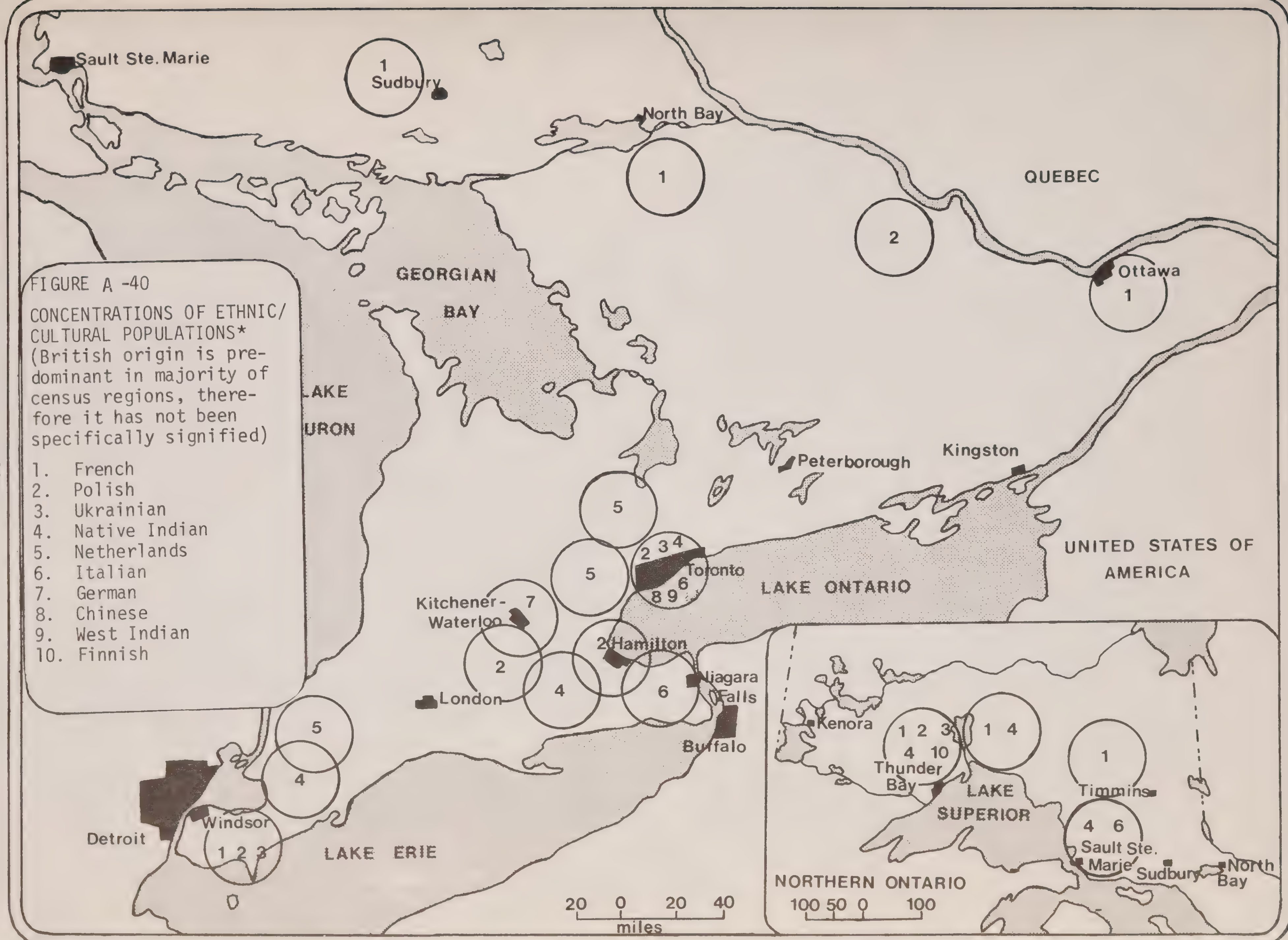


FIGURE A -40

CONCENTRATIONS OF ETHNIC/ CULTURAL POPULATIONS* (British origin is predominant in majority of census regions, therefore it has not been specifically signified)

1. French
2. Polish
3. Ukrainian
4. Native Indian
5. Netherlands
6. Italian
7. German
8. Chinese
9. West Indian
10. Finnish

These cultural themes may be used in the future, as the unifying elements which tie attractions and events together into clusters and which give large geographic area unity.

ii) Historical Themes.--Ontario contains historical resources which have tremendous potential for tourism development. An historical resource "consists of an historical feature(s) and its (their) associated landscape, which are a unique or representative remnant of significant past human activities and lifeways. In this instance, 'significance' is appraised in terms of the impact of a particular historical phenomenon on the associated provincial, regional or local economy and/or community" (Ministry of Culture and Recreation, May, 1975, p. 15).

The physical manifestations of historical resources are the historical features; "tangible remnants in the landscape of past human activities and lifeways" (Ministry of Culture and Recreation, May, 1975, p. 15). There are three types of historical features; archeological sites, historical buildings and miscellaneous features.

> a) Archaeological Sites: are subterranean, man-made evidences of non-random prehistoric or historic human activities and lifeways.
> b) Historical Buildings: are any buildings whose superstructures are sufficiently intact that they still resemble their original condition and reflect their former function.
> c) Miscellaneous Historical Features: are all other historical features, which may include building ruins or foundations, technological features such as roads, fences, bridges, etc., modifications of the landscape in the form of forest clearings, cropland, etc. and pictographs, petroglyphs, and rock structures, etc. (Ministry of Culture and Recreation, May, 1975, p. 15).

The historical landscape is in essence the natural setting which provides the physical context for the historical features. Historical themes are oriented around activities and lifestyles rooted in the historical landscape. The Historical Sites Branch (Ministry of Natural Resources) has identified a number of conceptual areas that provide an organizational framework for the discussion of historical themes in Ontario. "Each historical theme possesses a unity based upon a common activity or procedure, involving a substantial portion of the contemporary population, within a defined time span and geographical area"

(Historical Sites Branch, M.N.R., 1972, p. 4).

> The Economic and Social Conceptual Area consists of eleven Historical Themes, based on certain economic activities and their associated communities. The economic aspect of this Conceptual Area entails the various procedures of extraction, production and exchange which provided the means of sustenance and support for the province's population. The social aspect revolves around the related communities which molded the societal fabric of Ontario (Historical Sites Branch, M.N.R., 1972, p. 3).

The themes under the economic and social conceptual area include: Early Post-Glacial Immigrants, Environmental Frontiersmen, Indigenous Settlers, Traders and Potters, Indigenous Peoples' Farming Societies, Northern Hunters and Fishers, Post-Contact Tribes and Bands, Fur Trade and Fur Trading Communities, Agriculture and Agricultural Communities, Forest Industry and Forest Industry Communities, Mining and Mining Communities, and Transportation and the Integration of Economies and Communities.

> The Military Conceptual Area, which is composed of a single Theme, deals with activities and lifeways directly associated with the actions of armed forces in the defence or maintenance of territorial integrity and with attempts to gain or expand territorial hegemony, throughout the indigenous and European occupance of the province.
> Civil disputes or insurrections, except those which involved international implications, are considered as internal political phenomena.
> The Political Conceptual Area, which is also composed of a single Theme, deals with the issues and events of government and/or public affairs which resulted from the social, economic, cultural and ideological interactions of Ontarians, from the inception of large scale organized European communities in the province to the rise of modern Ontario (Historical Sites Branch, M.N.R., 1972, pp. 3-4).

Figure A-41 presents some of these themes graphically.

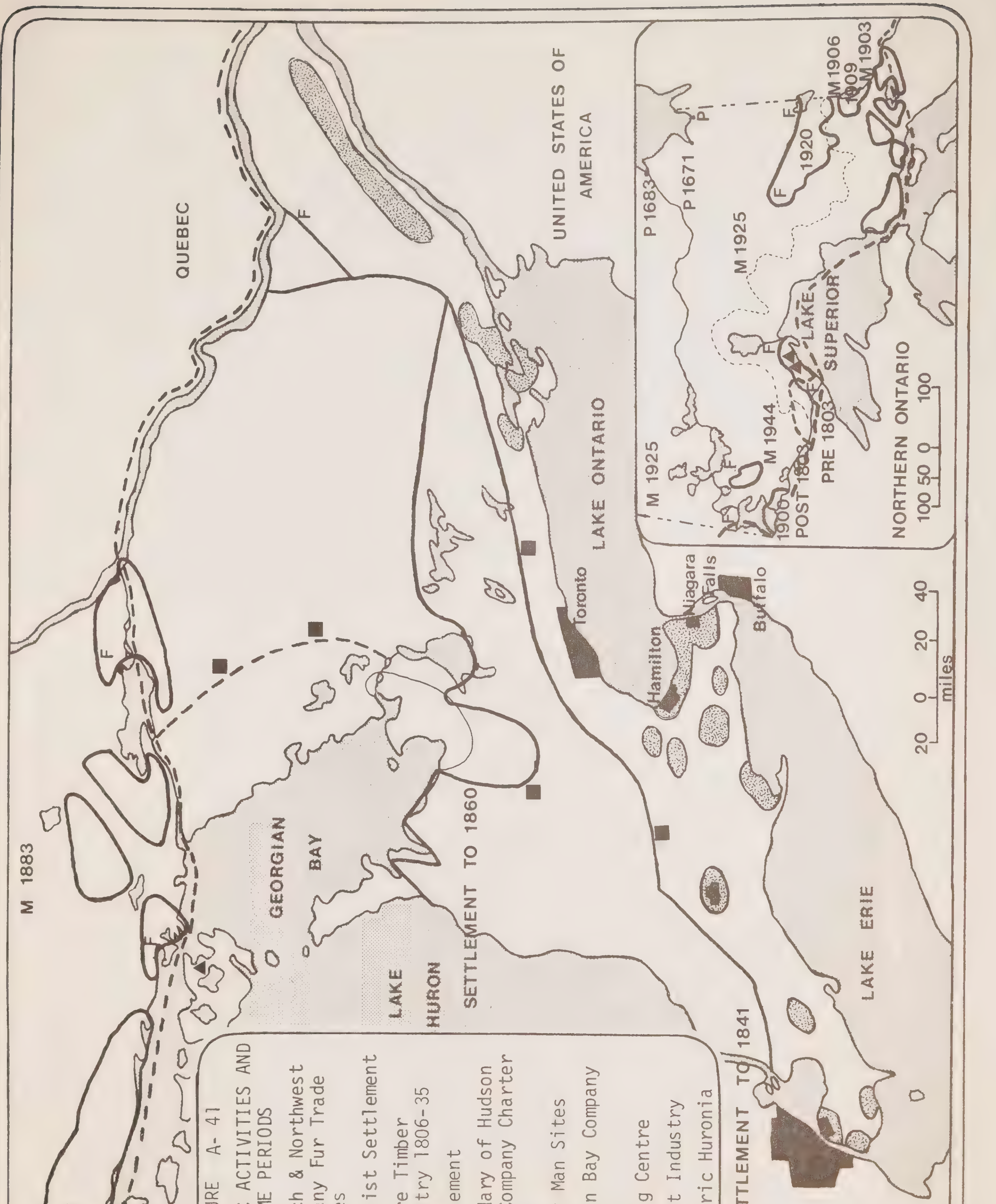


FIGURE A- 41
HISTORIC ACTIVITIES AND TIME PERIODS
French & Northwest Company Fur Trade Routes
Loyalist Settlement
Square Timber Industry 1806-35
Settlement
Boundary of Hudson Bay Company Charter 1670
Early Man Sites
P Hudson Bay Company Post
M Mining Centre
F Forest Industry
Historic Huronia
QUEBEC
UNITED STATES OF AMERICA
M 1883
GEORGIAN BAY
LAKE HURON
SETTLEMENT TO 1860
SETTLEMENT TO 1841
LAKE ONTARIO
LAKE ERIE
Toronto
Hamilton
Niagara Falls
Buffalo
20 0 20 40
miles
P 1683
P 1671
M 1925
M 1925
M 1944
1920
M1906
1909
M1903
1900
POST 1803
PRE 1803
LAKE SUPERIOR
NORTHERN ONTARIO
100 50 0 100

The historical themes must be portrayed in a tangible form to generate tourism visitation. Physical manifestations of themes include historical landscape features and heritage institutions. The former include archeological sites, historical buildings, farms, roads, bridges, etc. The latter include museums, galleries, historical plaques, and displays, etc. The large number of major attractions and events that already have been developed around these historical features gives evidence of their importance to tourism. Some examples of major historical attractions and events are: Old Fort Erie, Saint Marie Among the Hurons, the Naval and Military Establishments at Penetanguishene, Black Creek Pioneer Village, Old Fort Henry, Upper Canada Village, Fort William, North Bay Winter Fur Carnival and the Six Nations' Indian Pageant. There are many more which are described in the attractions and events section of this appendix (Section 3). They include numerous museums, galleries and historic buildings. Figure A-42 depicts some of the military structures, outdoor villages, great houses and public buildings of province-wide historical significance; in addition, by the end of 1974, a total of 796 provincial historical plaques had been erected.

Although a substantial number of historical features have already been developed into attractions and events that draw tourist visitation, there is considerable potential for further development. Figure A-41 identifies those historical landscapes with high potential for tourist visitation. In the interests of tourism, these landscapes and the associated historical features must be conserved. Fortunately, there are numerous other public agencies working in that direction in all levels of government.

At the provincial level, the preservation, interpretation and development of historical sites and structures is the responsibility of both the Ministry of Culture and Recreation and the Ministry of Natural Resources.

The Ministry of Culture and Recreation with the advice of the Ontario Heritage Foundationdetermines, after consultation with other ministries and agencies,priorities for historic site programmes and projects. These priorities are based on a systems plan directed toward the most comprehensive and balanced thematic and geographic representation

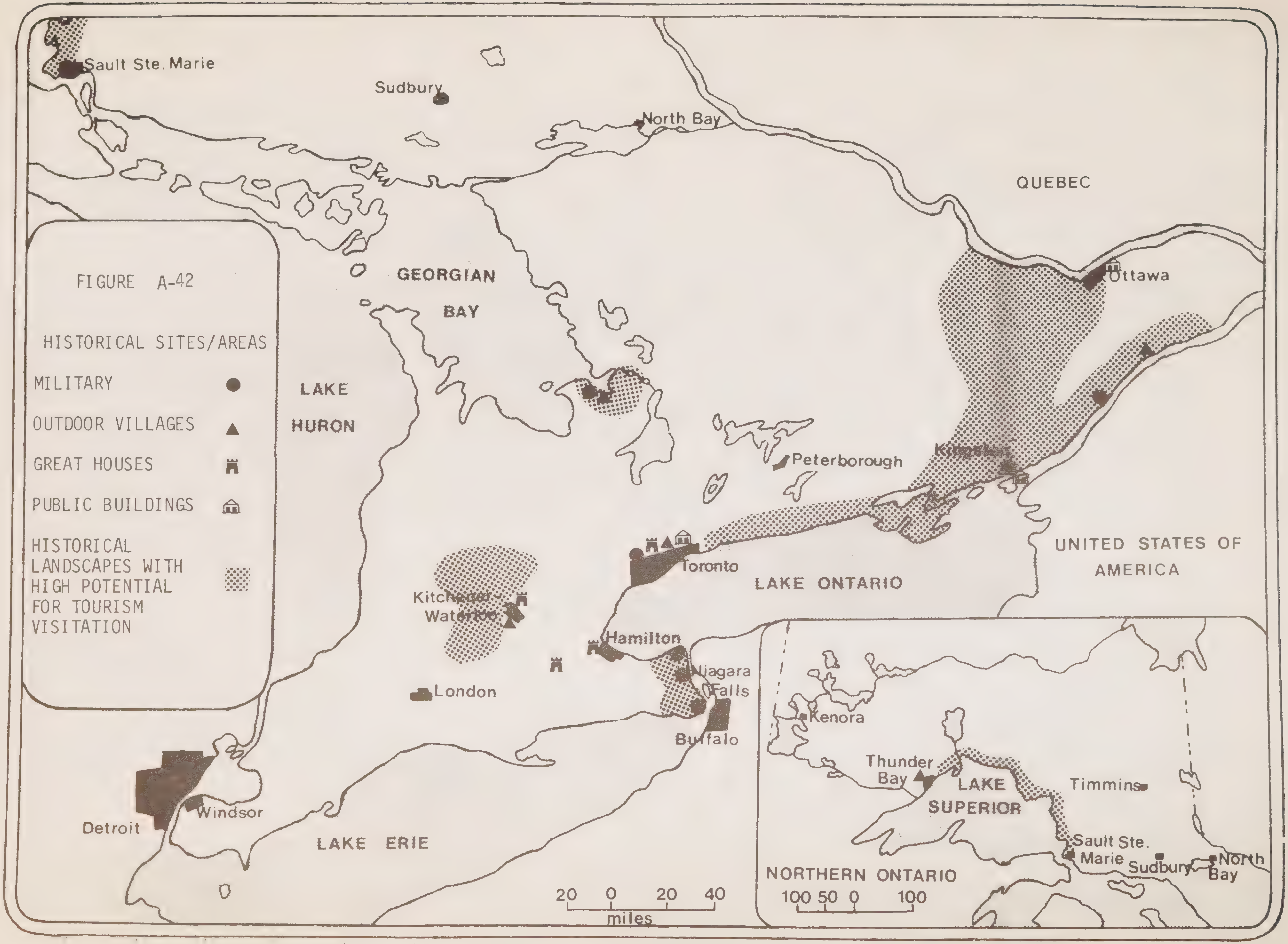


FIGURE A-42
HISTORICAL SITES/AREAS
MILITARY
OUTDOOR VILLAGES
GREAT HOUSES
PUBLIC BUILDINGS
HISTORICAL LANDSCAPES WITH HIGH POTENTIAL FOR TOURISM VISITATION
Sault Ste. Marie
Sudbury
North Bay
QUEBEC
Ottawa
GEORGIAN BAY
LAKE HURON
Peterborough
UNITED STATES OF AMERICA
Toronto
LAKE ONTARIO
Hamilton
Niagara Falls
Buffalo
London
Detroit
Windsor
LAKE ERIE
20 0 20 40
miles
Kenora
Thunder Bay
LAKE SUPERIOR
Timmins
Sault Ste. Marie
Sudbury
North Bay
NORTHERN ONTARIO
100 50 0 100

of Ontario's history and prehistory. By including all government projects involving commemorations, attractions or other developments which relate to historical themes or resources as a part of this process, the provision of varied and exciting tourism opportunities through historical resources will be maximized.

The Ontario Heritage Act (1975) established the Ministry of Culture and Recreation responsible for heritage conservation, protection and preservation. The Ontario Heritage Foundation, which operates under the auspices of the Ministry of Culture and Recreation, is given considerable power under this Act. It not only has an advisory function on matters relating to property of historical, architectural, archaeological, recreational, aesthetic or scenic interest <u>but</u> can "Acquire, hold, dispose of and restore these properties for the enjoyment and benefit of the people of Ontario, enter into agreements with property owners or prospective donors, conduct and arrange exhibits, engage the services of experts and other persons, undertake research and provide assistance, advisory services and training programs to individual institutions, agencies and organizations in Ontario having similar aims and objectives as the Foundation" (Ministry of Colleges and Universities, 1974, p. 4-5, subsections 9 and 10).

The Ontario Heritage Act makes provisions for the establishment of a Local Architectural Conservation Advisory Committee by councils of municipalities to advise and assist council on matters relating to buildings or properties which have been designated by the municipalities to be of historical or architectural value.

The Ministry of Culture and Recreation is also involved in the operation of a number of tourist attractions; the historic naval and military establishments at Penetanguishene, Museum of the Upper Lakes, and Saint Marie Among the Hurons. It administers a system of financial aid to local museums and to the Royal Ontario Museum. <u>A Directory of Provincially Assisted Cultural Resources of Ontario</u>, which includes information about parks, historic sites and museums and sundry other concerns, is published by this Ministry.

Within the Ministry of Natural Resources, the Division of Parks is currently developing and operating a comprehensive outdoor recreation programme, an integral part of which involves the management and presentation of historical resources. The Division has designed a Historical Systems Plan in which fundamental elements of Ontario's prehistory and history have been identified as themes.

> The objective of the historical class of parks is to provide recreational, educational, and scientific opportunities for exploring and appreciating themes of provincial historical significance, on the sites which best represent those themes:
> a) by protecting and preserving provincially significant prehistorical and historical resources;
> b) by presenting and interpreting Ontario's human heritage in an outdoor setting, communicating a site-specific sense of time and place which clearly relates features and events to the history and geography of the surrounding region and of the province;
> c) by providing recreational and informal learning opportunities for a wide range of individuals and interest groups; and
> d) by providing for the advancement of our knowledge of Ontario's past, through encouraging and facilitating, where compatible with park objectives and management philosophy, direct investigation by qualified researchers as well as the appropriate level of involvement and participation by other persons interested in such research (Ministry of Natural Resources, February, 1975, p. 50-51).

Many provincial parks have interpretive programs which utilize exhibits, museums, signed trails, hikes and theatrical presentations to describe the historical environment. Both the Niagara Parks Commission and the St. Lawrence Parks Commission operate and maintain historical sites. The former offers educational and interpretive programs relating to the natural history and history of the Niagara Frontier; historical sites include Old Fort Erie, Willoughby Historical Museum, Mackenzie House and several others. Old Fort Henry in Kingston and Upper Canada Village near Morrisburg are operated through the St. Lawrence Parks Commission.

Grants to Conservation Authorities in the province are administered through the Ministry of Natural Resources. Although historical undertakings are not included in the grants under the current Conservation Authorities Act, numerous Conservation Authorities operate historical attractions and a number of the Authorities have established charitable foundations to enable them to accept support from private donors. The Authorities are also eligible for grants, from the Ontario Heritage Foundation, to restore historical buildings which the Authorities own and for operating grants for historical museums from the Ministry of Culture and Recreation.

Another provincial undertaking is the Heritage Highway program, which is a co-operative project between Ontario and Quebec. Current involvement in this program consists primarily of the signing of the designated routes by the Ministry of Transportation and Communications, at the request of the Ministry of Industry and Tourism. The Heritage Highways are discussed more fully in the transportation section of this chapter (Section E).

At the federal level, the Agreement for Recreation and Conservation (A.R.C.) is administered under the Department of Indian Affairs and Northern Development (D.I.A.N.D.). It incorporates national historic waterways, including canals, national historic land routes, national wild rivers and national historic and scenic parkways as components of a series of environmental corridors to be developed by federal, provincial, regional and local levels of government and private agencies. The purpose is to commemorate the cultural and natural history of Canada in a pattern of linear parks. The corridors are the subject of federal/provincial negotiation and anyone may submit proposals.

Under the Historical Sites and Museums Act, which was also co-ordinated by D.I.A.N.D., a nation-wide investigation of historic buildings is currently in progress. Provision was made for Federal financial involvement but it has not been substantial in Ontario.

Finally, Heritage Canada, an independent national trust was established in April 1973 with a 12 million dollar government endowment and thereafter, supported by the private sector. Heritage Canada encourages

the preservation of heritage property, which is potentially a major incentive to tourism. This organization may have access to property adaptable to use by the travel industry.

Heritage Canada promotes the concept of area or zone conservation. Rather than disperse a limited budget on the purchase of widespread, small sites and a few scattered buildings, a program to promote the conservation of heritage areas in communities or national sites has been instigated. The list of potential heritage conservation districts includes Amherstburg, Ancaster, Kingston, Niagara-on-the-Lake, Ottawa's Lower Town, Perth, Petrolia, Port Hope and Prescott.

The principle of area conservation can certainly be applied to tourism development. Economically it makes much more sense to invest in areas where a number of features can be developed to support an historical theme and to give the visitor a variety of opportunities to explore that theme.

Obviously tourism and profit-making are not totally the primary initiations for the establishment of historical and cultural attractions/events. Pride in our heritage, perpetuation of customs, and protection of meaningful sites are often greater motivating forces than economics.

> Such cultural values sometimes are in a delicate balance when, incidental to the original purpose, great visitation and its accompanying commercialism, tend to damage the attraction itself. Tourism can also be adversely affected. . . . If these conditions of balanced tourist inflow, good service and balanced range of attractions are not met, decay is likely to set in, and although the results may not be apparent at first, in the end both quality and volume of tourism may suffer, with consequent economic as well as social and cultural losses (Gunn, 1972, p. 25).

These concerns must be considered in the future development of cultural and historical attractions.

9. Summary

As was discussed in the introduction to this chapter, the components of the resource base or physical plant are strongly interrelated with no one component assuming constant supreme status. The components do, however, align themselves with three aspects of the tourism experience.

Population (in terms of market potential), hospitality resources (most specifically, directive services) and service centres (market location) relate to origin; natural features, attractions and events, service centres (support resources), accommodation, population (service resources) and hospitality resources (especially receptive services) relate to destination; and accommodation, hospitality resources and transportation relate to the travel experience.

It is difficult to determine which of the three aspects (and therefore, the related resource components) is considered first when attempting to understand tourism; there appears to be no real beginning point. For example, destination resources are not valuable to tourism unless an adequate transportation link (including appropriate hospitality and accommodation resources) is in place, and an adequate market exists that perceives the destination resources as desirable and has the free-time budget and financial resources available to afford the trip. Similarly, an adequate transportation system is of no value to the tourism industry unless accessible destination resources exist. Inadequate accommodation along the travel axis* and at the destination can reduce the effectiveness of high quality resources (natural features, attractions and events).

The value of high quality market (population), transportation and destination resources could be undermined by inadequate directive (hospitality) resources in that the market must be made aware of the existence of desirable destinations and must be informed about timing,

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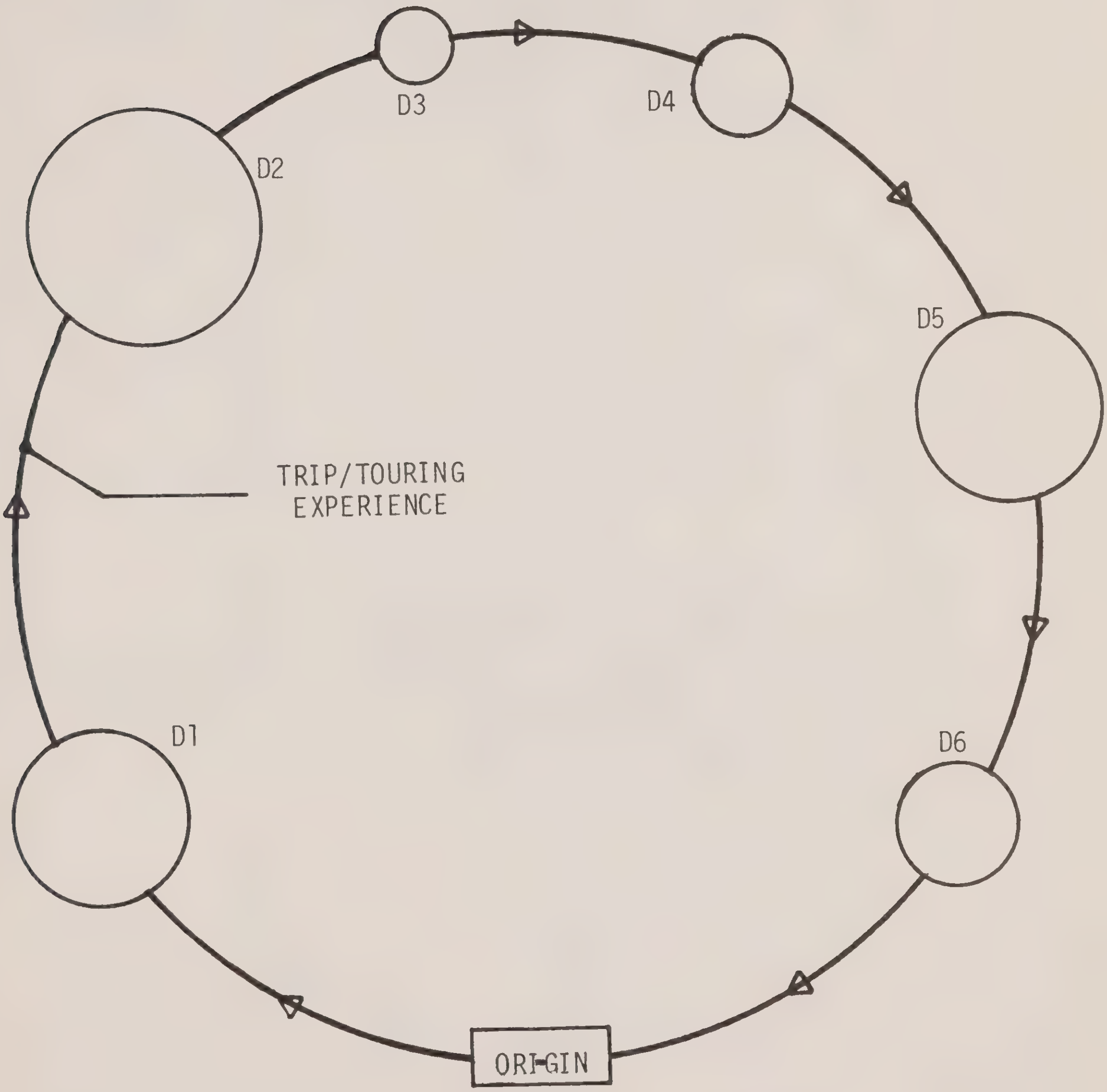
*It is necessary to understand that the trip may in itself be an experience (touring) and that some tourists treat the trip as others would the destination. An adequate quantity and quality of accommodation, hospitality resources and natural features, attractions and events also must be strongly linked to the travel experience.

cost and mode and route of transit. As well, the awareness of the prospective traveller about a desirable tourism experience often must be heightened to stimulate and aid travel decisions.

FIGURE A-43

LINEAR RELATIONSHIP BETWEEN MAJOR ASPECTS OF TOURISM EXPERIENCE

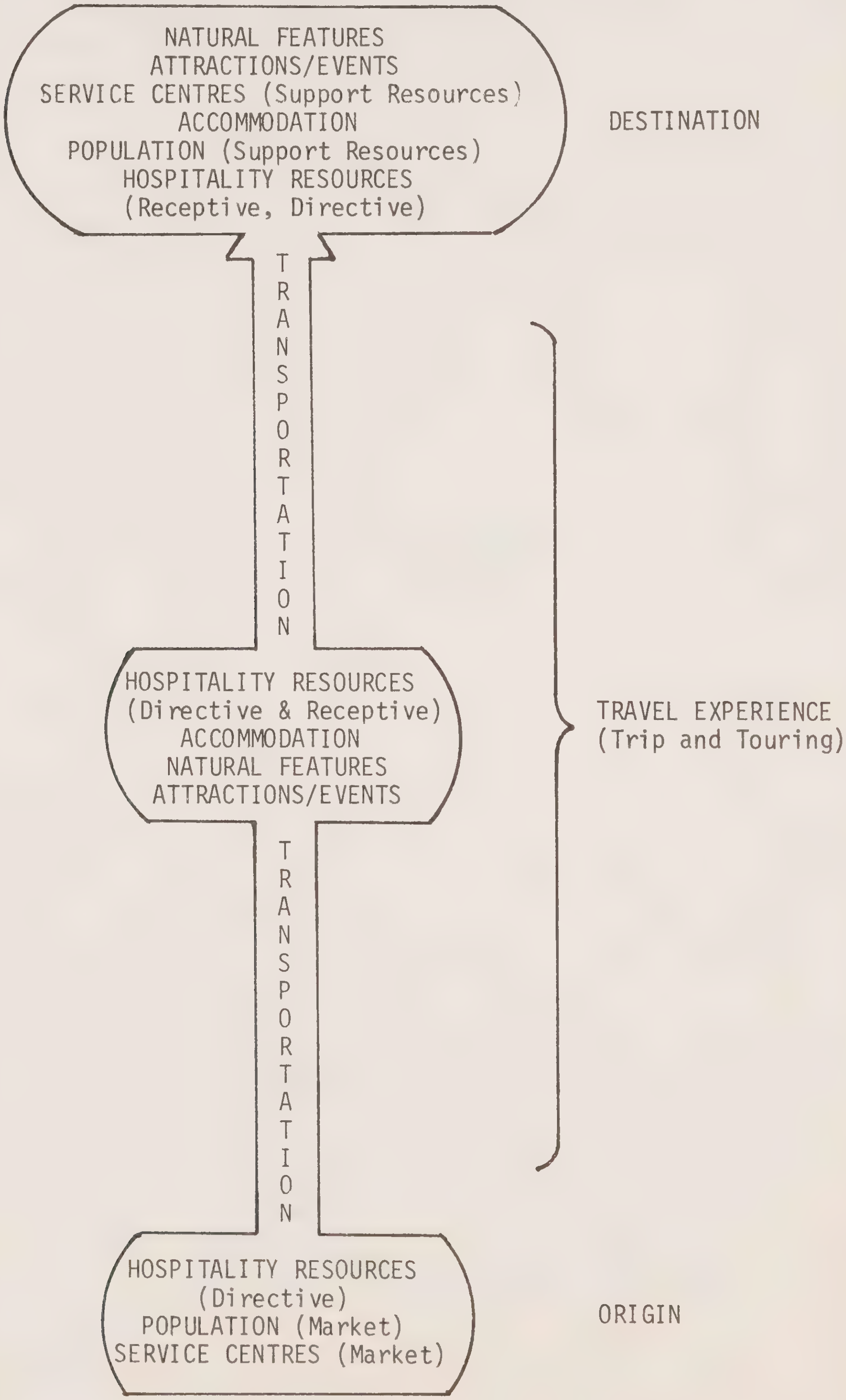


*D = Destination (primary and/or secondary).

FIGURE A - 44

ORIENTATION OF RESOURCE COMPONENTS TO THE TOURISM EXPERIENCE

*Refer to Figure A- 42 for Linear Relationships



APPENDIX B

TRAVEL MARKETS

APPENDIX B

TRAVEL MARKETS

It is the objective of this appendix to present supplementary background information to Chapter III. This information assisted in identifying locations in the Province with high visitation and in identifying significant market groups.

Ontario residents and Americans, respectively, are the Province's major market groups. Other Canadians make up 10% of the total person visits, of which a high percentage are from the provinces of Manitoba and Quebec. Overseas visitors make up less than 1% of the total person visits to Ontario, of which over half are from European countries. The largest market groups from the European countries are from the United Kingdom, Germany, the Netherlands and Italy, respectively.

TABLE B-1

NUMBER OF PERSON VISITS TO ONTARIO (1973)

ORIGIN	NUMBER PERSON VISITS	PERCENTAGE
Ontario	60,728,000	64
U.S.	23,298,000	25
Other Canadian Provinces	9,694,000	10
Overseas:	673,834	.71
Europe	(472,393)	
Africa	(9,706)	
Central America & Caribbean	(78,203)	
South America	(26,756)	
Oceanic & Other Ocean Isle	(20,749)	
TOTAL	94,393,834	100.0

Source: Tourism Statistical Handbook 1975 and Travel Between Canada and Other Countries, Statistics Canada, August 1975.

The varying nature of the Province with its urbanized areas in the south and wilderness in the north, plays a role in determining the type of visitor to areas in Ontario and the activities in which they participate. It is thus beneficial to look at the origin of visitors by destination. For the purpose of this study the 'old' Ontario Economic Regions were used to discuss destination areas within the Province.

Figure B-1 illustrates the origin of visitors to Ontario under the general categories of Ontario Resident, American and Other Canadians. To more clearly delineate the origin of visitors, a more specific breakdown by state, province and, in the case of the Ontario resident, area of residence within the Province was used. Table B-2 presents the three largest origin groups to each destination region in the Province.

Examining direct travel related expenditures reveals that the market group contributing the highest percentage to the travel economy is the Ontario resident.

TABLE B-3

RELATED DIRECT TRAVEL EXPENDITURES IN ONTARIO
($ MILLIONS)

ORIGIN	1971	%	1972	%	1973	%	1973 PER PERSON VISIT EXPENDITURE
Ontario	707.5	45.45	761.5	46.68	822.0	44.97	$13.54
U.S.	573.3	36.83	552.4	33.86	626.4	34.27	$26.89
Other Cana-Canadian Provinces	209.8	13.48	225.8	13.84	243.7	13.33	$25.14
Overseas	65.9	4.23	91.5	5.61	135.8	7.43	$201.48
TOTAL	1556.5	100%	1631.2	100%	1827.9	100%	

Source: Tourism Statistical Handbook 1975.

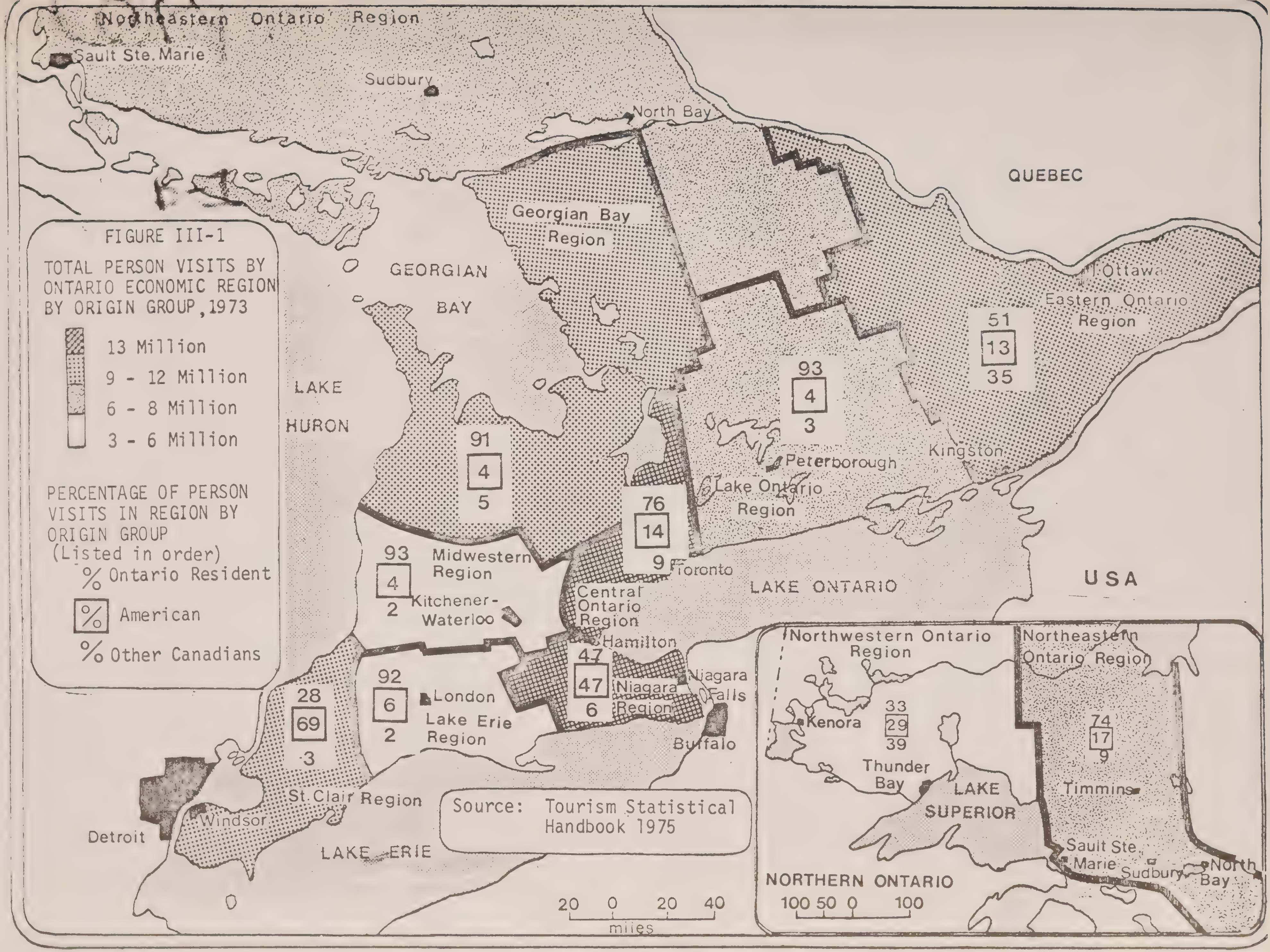


FIGURE III-1
TOTAL PERSON VISITS BY ONTARIO ECONOMIC REGION BY ORIGIN GROUP, 1973
13 Million
9 - 12 Million
6 - 8 Million
3 - 6 Million
PERCENTAGE OF PERSON VISITS IN REGION BY ORIGIN GROUP (Listed in order)
% Ontario Resident
% American
% Other Canadians
Northeastern Ontario Region
Sault Ste. Marie
Sudbury
North Bay
QUEBEC
Georgian Bay Region
GEORGIAN BAY
LAKE HURON
91 4 5
Ottawa
Eastern Ontario Region
51 13 35
93 4 3
Kingston
Peterborough
Lake Ontario Region
76 14 9
Toronto
LAKE ONTARIO
USA
Midwestern Region
93 4 2
Kitchener-Waterloo
Central Ontario Region
Hamilton
47 47 6
Niagara Region
Niagara Falls
Buffalo
92 6 2
London
Lake Erie Region
28 69 3
St. Clair Region
Windsor
Detroit
LAKE ERIE
Source: Tourism Statistical Handbook 1975
20 0 20 40
miles
Northwestern Ontario Region
33 29 39
Kenora
Thunder Bay
LAKE SUPERIOR
Northeastern Ontario Region
74 17 9
Timmins
Sault Ste. Marie
Sudbury
North Bay
NORTHERN ONTARIO
100 50 0 100

TABLE B-2

VISITOR ORIGIN BREAKDOWN BY DESTINATION AREA

DESTINATION REGION	ORIGIN				
	ONTARIO RESIDENT*		AMERICAN	OTHER CANADIANS**	
	WEEKEND TRIPS	VACATION TRIPS			
Northwestern	Northwestern 74% Northeastern 11% Central Ontario 9%	Central Ontario 41% Northwestern 16% Northeastern 14%	Minnesota 54% Illinois 21% Rest of U.S.A.*** 20%	Manitoba 70% Other Provinces 22% Quebec 8%	
% By Origin Group	33%		29%	38%	100%
Northeastern	Northeastern 48% Central 28% Niagara 6%	Northeastern 25% Niagara 19% Central Ontario 18%	Michigan 74% Rest of U.S.A. 15% Ohio 7%	Quebec 53% Other Provinces 31% Manitoba 16%	
% By Origin Group	74%		17%	9%	100%
Georgian Bay	Central 68% Niagara 9% Midwestern 9%	Central Ontario 50% Niagara 15% St. Clair 10%	New York 40% Michigan 18% Rest of U.S.A. 15%	Quebec 60% Other Provinces 39% Manitoba 1%	
% By Origin Group	91%		4%	5%	100%
Midwestern	Central 41% Midwestern 19% Niagara 13%	Central 33% Northeastern 14% Eastern 12%	Michigan 50% New York 17% Ohio 17%	Other Provinces 54%	
% By Origin Group	93%		4%	3%	100%
Lake St. Clair	Central 35% Lake St. Clair 30% Lake Erie 21%	Lake St. Clair 42% Lake Erie 26% Niagara 12%	Michigan 87% Rest of U.S.A. 6% Ohio 3%	Other Provinces 50% Quebec 36% Manitoba 14%	
% By Origin Group	28%		69%	3%	100%
Lake Erie	Central 36% Lake Erie 17% Niagara 17%	Lake Erie 30% Niagara 26% Central 17%	Michigan 94% Rest of U.S.A. 3% New York 1%	Other Provinces 54% Quebec 46%	
% By Origin Group	92%		6%	2%	100%
Niagara	Central 49% Niagara 20% Lake Erie 8%	Central 25% Niagara 23% St. Clair 16%	New York 74% Rest of U.S.A. 9% Ohio 7%	Quebec 58% Other Provinces 32% Manitoba 10%	
% By Origin Group	47%		47%	6%	100%

* Origin areas for Ontario Resident by Economic Regions.

** Data source used only investigated the three origin areas.

*** Rest of United States includes all states except Michigan, New York, Ohio, Pennsylvania, Illinois and Minnesota.

continued . . .

TABLE B-2, continued

DESTINATION REGION	ORIGIN: ONTARIO RESIDENT* WEEKEND TRIPS	ONTARIO RESIDENT* VACATION TRIPS	AMERICAN	OTHER CANADIANS**	
Central Ontario	Central 46% Niagara 11% Midwestern 9%	Central 38% Northeastern 17% Eastern 8%	New York 50% Michigan 25% Ohio 9%	Quebec 38% Other Provinces 51% Manitoba 11%	
% By Origin Group	76%		14%	10%	100%
Lake Ontario	Central 77% Lake Ontario 8% Niagara 5%	Central Ontario 65% Niagara 14% Lake Ontario 7%	Ohio 32% New York 26% Michigan 18%	Quebec 62% Other Provinces 36% Manitoba 2%	
% By Origin Group	93%		4%	3%	100%
Eastern	Eastern 39% Central 35% Niagara 7%	Central Ontario 31% Eastern 26% Niagara 12%	New York 55% Pennsylvania 19% Rest of U.S.A. 11%	Quebec 56% Other Provinces 39% Manitoba 5%	
% By Origin Group	51%		14%	35%	100%

Source: Ontario Recreation Survey 1973-74, Ministry of Industry and Tourism.
U.S. Auto Exit Survey 1973-74, Ministry of Industry and Tourism.
A Survey of Visitors to Ontario Government Travel Information Centres (adjusted), Ministry of Industry and Tourism, 1972.

Travel expenditures have increased over the three years. The largest increase in expenditures occurred from 1972 to 1973 with a 12% increase compared to a 5% increase from 1971 to 1972. Even though Ontario residents overall contribute the most to the tourism economy, the per person expenditures is the least of all market groups. The overseas traveller in 1973 spent an average of $201.48, whereas the Ontario resident spent approximately $13.50.

The reason for travel to an area is largely determined by the opportunities afforded by the physical and human resources. In turn, the purpose of trip influences expenditures, type of accommodation used, mode of travel, season of travel, etc.

In Ontario the most significant reason for travel for all market groups is to 'visit friends and/or relatives' (refer to Table B-4). The Ontario residents tend to 'spend time at a vacation spot' or participate in 'outdoor recreation activities' such as 'boating', 'camping' and 'tenting'. 'Sightseeing' both in urban areas and away from urban areas was also a popular trip purpose.

The United States market differs somewhat from the other market groups. 'Visiting friends and/or relatives' comparatively is not a significant trip purpose for the U.S. visitor as it is for other market groups. This market group appears to be interested in 'outdoor recreation activities' and 'touring Ontario's countryside'. There also appears to be a relatively high interest in Ontario's 'special events' which, by definition, includes sports, festivals and annually scheduled events.

The most popular reason for travel to Ontario by other Canadians is to 'visit friends and/or relatives'. Ontario's urban centres have a comparatively high appeal for Other Canadians. "Sightseeing' away from urban areas and 'outdoor recreation activities' is also a significant trip purpose for this market group.

Business and convention travel has been included for the Overseas market because several studies have shown the overseas visitor tends to combine business and pleasure when travelling such great distances. To visit friends and/or relatives again is the most significant trip purpose for this market group. Approximately 38% of the overseas market

TABLE B- 4

REASON FOR TRAVEL TO AND WITHIN ONTARIO BY PERSON VISITS (1973-74)

ONTARIO RESIDENT [1]		UNITED STATES [2]		OTHER CANADIANS [1]		OVERSEAS**[3]	
Combination Business and Pleasure	7%	Combination Business and Pleasure	2%	Combination Business and Pleasure	9%	Business/ Conventions	15%
		Route to U.S.A.	6%				
		Route to Other Province	.8%				
Visit Friends and Relatives	43%	Visit Friends and Relatives	20%	Visit Friends and Relatives	67%	Visit Friends and Relatives	44%
Stay at Own Summer Place	6%	Stay at Own Cottage	4%	Stay at Own Summer Place	.4%	Holiday/Recreation	38%
Spend Time At A Vacation Spot	27%	Ontario Resort Vacation	3%	Spend Time At A Vacation Spot	11%		
Camping, Tenting, Fishing/Boating/ Other Outdoor Activities	24%	Outdoor Recreation Activities	9%	Camping/Tenting/ Fishing/Boating/ Other Outdoor Recreation Activities	14%		
		See Niagara Falls	10%	Visit Man & His World	1%		
Sightsee Away From Urban Areas	15%	Tour Ontario Country	9%	Sightsee Away From Urban Areas	18%		
Shopping	5%	To Shop	5%	Shopping	8%		
Attends Special Events	5%	Attend Special Events	9%	Attend Special Events	5%		
Other Non-Business	4%	Other Non-Business	17%	Other Non-Business	5%	Other	2%

*Percentages add to more than 100% because of Multiple Answers.

**Business has been excluded except for the Overseas Visitor.

Source: 1. Canadian Annual Vacation Patterns Survey 1974
2. U.S. Auto Exit Survey, 1973-74
3. Statistics Canada, Catalogue 66-201, 1974

travel to Canada on a pleasure trip. Depending on the origin of the visitor, the type of pleasure trip taken will vary; for example, the Japanese visitor tends to be interested in sightseeing in urban centres, whereas travellers from Germany appear to be interested in open space/ outdoor recreation activities such as camping, boating, fishing and hunting.

With the most significant trip purpose being to 'visit friends and/or relatives' it is not surprising that the accommodation used by a high percentage of the visitors is the home of a friend or relative (refer to Table B-5). Corresponding with purpose of trip, the U.S. market stays at the home of a friend or relative the least of the four market groups and tends to use hotel/ motor hotel/motel more often than all other accommodations. A high percentage of both Americans and Ontario residents stay at their own cottage when vacationing in Ontario. The Ontario resident uses hotels/motels the least of all market groups and stays at campgrounds or trailer parks more often than the American and Other Canadian. Almost 60% of the Other Canadians stay at the home of a friend or relative while visiting Ontario. Other Canadians tend to use hotels/motels more than other types of commercial accommodations, and a relatively small percentage stay at their own cottage.

TABLE B-5

ACCOMMODATION USED BY TRAVELLERS IN ONTARIO (1973-74)

TYPE	ORIGIN		
	ONTARIO[1]	UNITED STATES[2]	OTHER CANADIAN PROVINCES[3]
Home of friend or relative	31%	22%	57%
Own cottage	21%	21%	5%
Hotel	4%	7%	6%
Motel/motor hotel	12%	19%	17%
Commercial cabin or cottage	8%	12%	1%
Campground or trailer park	21%	11%	11%
Other	2%	6%	3%

Sources: 1. Canadian Annual Vacation Pattern Survey 1974
2. U.S. Auto Exit Survey 1973-74
3. Canadian Annual Vacation Pattern Survey 1974

Figures B-2 and B-3 illustrate the three types of accommodation used most frequently by Ontario residents on vacation and weekend trips.*

The differences in the type of accommodations used on vacation and weekend trips are evident from these maps. On weekend trips, the variety in types of accommodation used in all regions is largely limited to homes of friends or relatives, private cottages and, depending on the zone, either hotel/motel or tent/tent trailer. Vacation trips appear to be characterized by more diversity in the types of accommodation used; although the private cottage remains the main type of accommodation (as found on weekend trips), a shift is apparent from staying at the home of a friend or relative to using resort lodges, private hobby farms, private chalets or cabins and other means of camping (i.e., pickup camper) in several regions in the Province.

In 1974, the percentage of trips taken by various modes of transport was as follows:

TABLE B-6

MODE OF RECREATIONAL/TOURISM TRAVEL IN ONTARIO (1974)

MODE	ONTARIO[1]	U.S.[2]	OTHER CANADIANS	MODE*	OVERSEAS[2]
Auto	85%	87%	48%	Land (via USA)	39%
Plan	4%	2%	36%	Air (Direct entry)	47%
				(Entry via USA)	15%
Train	1%	.03%	9%		
Bus	3%	4%	5%		
Boat	.38%	5%**	.15%	Water	.003%
Motor Camper	3%	-	2%		
Other	4%	1%	.67%		
TOTAL	100%	100%	100%		

* Does not include those who entered Ontario via another province

** Include U.S. entries by car ferries.

Sources: 1. Canadian Annual Vacation Patterns Survey 1974
2. Statistics Canada, Catalogue 66-001, August 1975.

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*Accommodation used by other Canadians and American visitors is not available by destination region; refer to Table B-5 for accommodation used by these market groups in Ontario.

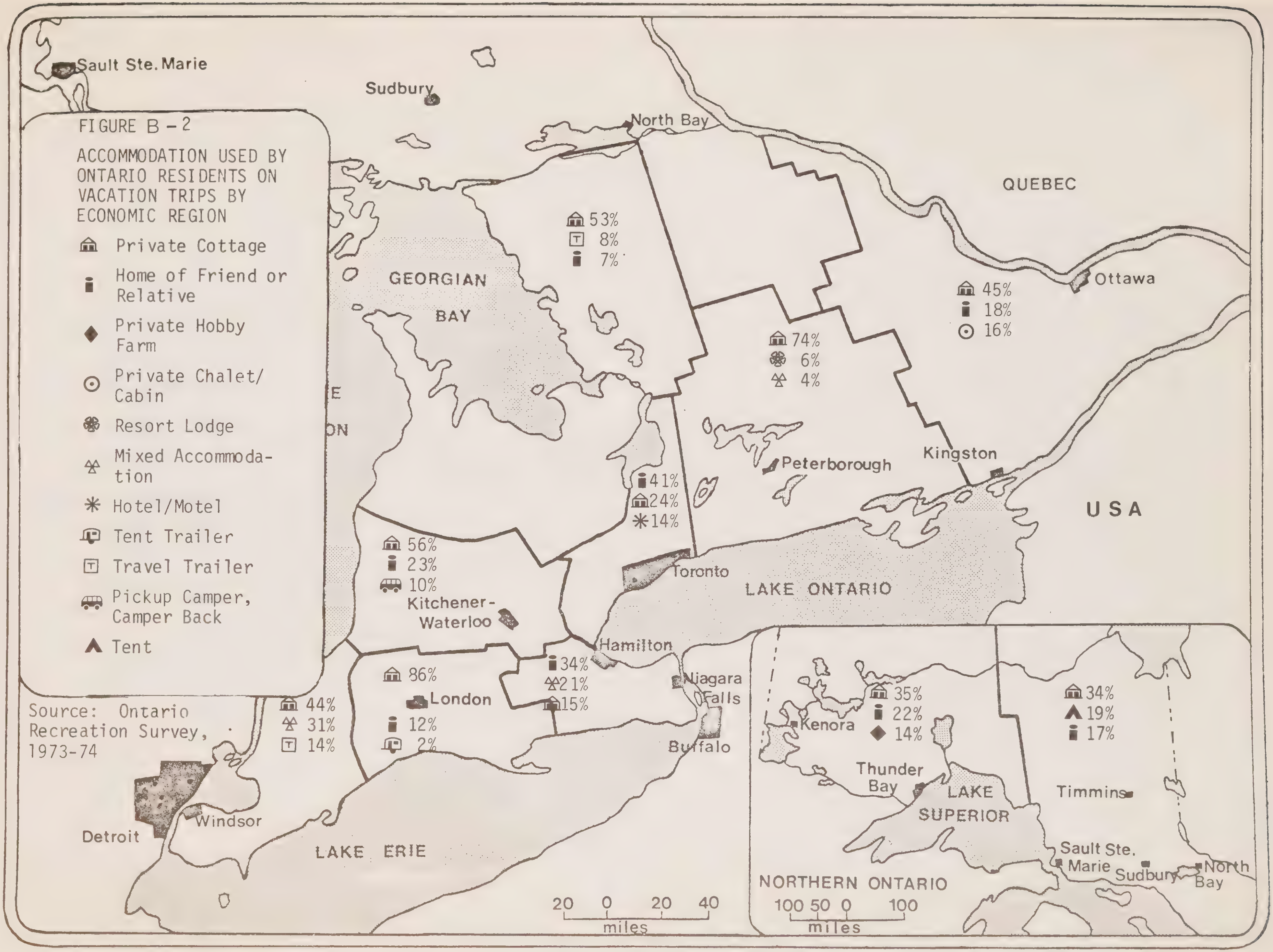


FIGURE B - 2
ACCOMMODATION USED BY ONTARIO RESIDENTS ON VACATION TRIPS BY ECONOMIC REGION
Private Cottage
Home of Friend or Relative
Private Hobby Farm
Private Chalet/ Cabin
Resort Lodge
Mixed Accommoda- tion
Hotel/Motel
Tent Trailer
Travel Trailer
Pickup Camper, Camper Back
Tent
Source: Ontario Recreation Survey, 1973-74
Sault Ste. Marie
Sudbury
North Bay
QUEBEC
Ottawa
GEORGIAN
BAY
53%
8%
7%
45%
18%
16%
74%
6%
4%
Kingston
Peterborough
41%
24%
14%
USA
56%
23%
10%
Kitchener-
Waterloo
Toronto
LAKE ONTARIO
Hamilton
86%
London
12%
2%
34%
21%
15%
Niagara
Falls
Buffalo
44%
31%
14%
Windsor
Detroit
LAKE ERIE
20 0 20 40
miles
Kenora
35%
22%
14%
Thunder
Bay
LAKE
SUPERIOR
34%
19%
17%
Timmins
Sault Ste.
Marie
Sudbury
North
Bay
NORTHERN ONTARIO
100 50 0 100
miles

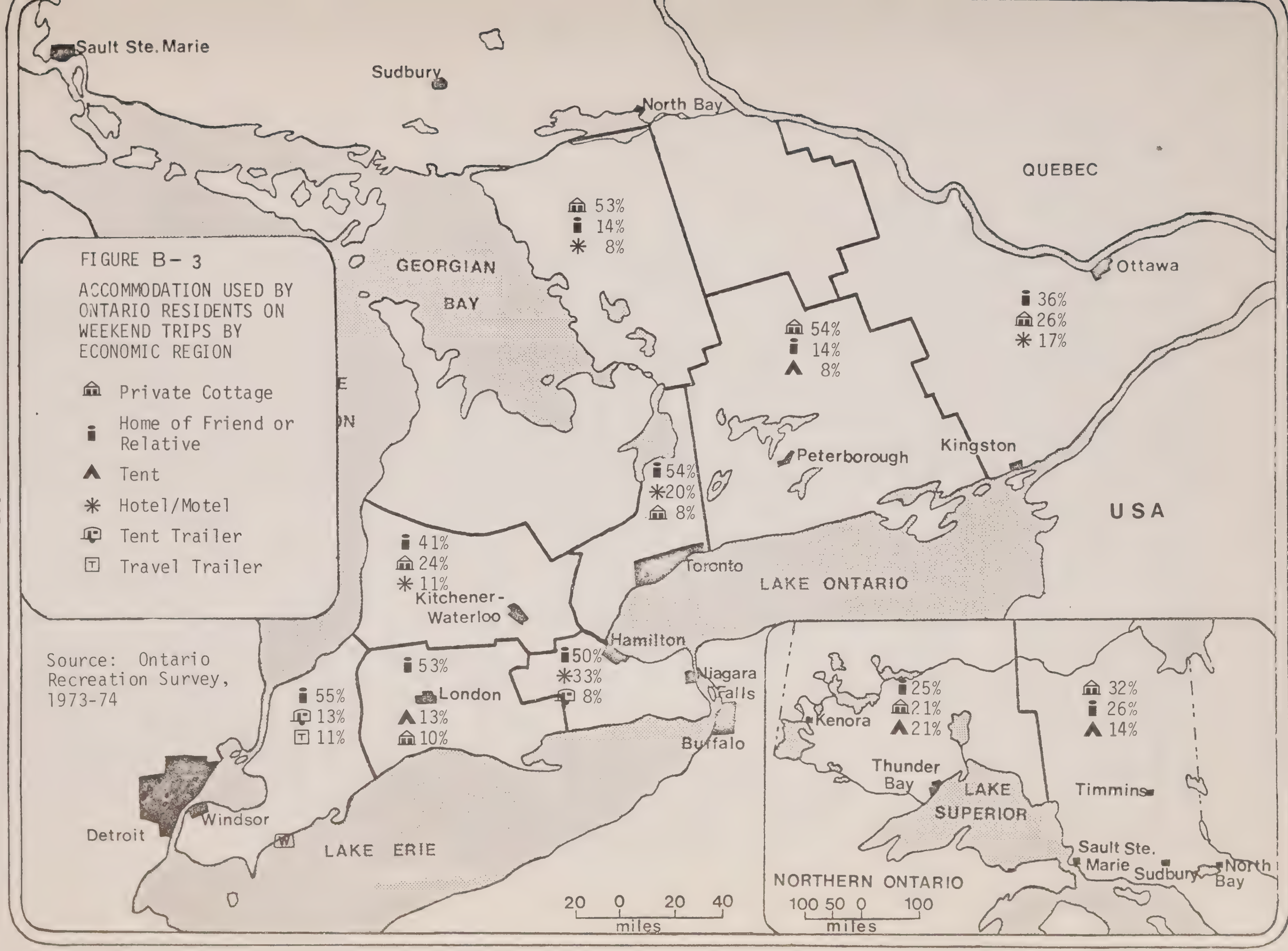


FIGURE B- 3

ACCOMMODATION USED BY ONTARIO RESIDENTS ON WEEKEND TRIPS BY ECONOMIC REGION

- Private Cottage
- Home of Friend or Relative
- Tent
- Hotel/Motel
- Tent Trailer
- Travel Trailer

Source: Ontario Recreation Survey, 1973-74

The private automobile is the predominant means of travel for all market groups with the exception of the overseas traveller. A significant percentage (36%) of the Other Canadians travel by air, which may be attributed to the fact that a high percentage of this market group travel to Ontario for the prime purpose of 'visiting friends and/or relatives'. All other modes (train, bus and boat) are relatively insignificant modes of travel for all market groups.

Ontario tourism is characterized by peaking seasonal visitation. Just under 50% of the recreational/tourism visitation occurs during the summer months (July 1st to September 30th) with the winter months receiving the least.

TABLE B-7

VOLUME OF VISITATION BY QUARTER
(PERSON VISITS)

ORIGIN	SUMMER JULY-SEPT.	FALL OCT.-DEC.	WINTER JAN.-MARCH	SPRING APRIL-JUNE
Ontario	46.18%	19.08%	14.46%	20.28%
United States	43.10%	17.29%	13.85%	25.76%
Other Canadians	36.68%	18.72%	17.77%	26.83%
Overseas	47.0 %	17.50%	8.70%	26.80%
TOTAL	46.18%	19.08%	14.46%	20.28%

All market groups appear to travel proportionately during similar quarters. There is some deviation from the average by other Canadians who travel somewhat less during the summer months than the other market groups.

In summary, the general Provincial tourist market characteristics are:

- the largest market visitation group to the Province is the Ontario resident
- the U.S. market is the largest non-resident tourist market in the Province

- in general, areas contiguous with the United States or other Canadian provinces show a higher proportion of non-resident visitors
- the resident market contributes the highest percent to the total tourist dollar expenditures in the Province
- non-residents spend from 2-15 times more per person visit that the Ontario resident and therefore represent a lucrative potential
- to 'visit friends or relatives' accounts for the highest percentage of all trip purposes for all market groups
- excluding the trip purpose to 'visit friends or relatives', a substantial percentage of the Ontario market have to 'spend time at a vacation spot' as their reason for travel in Ontario; whereas a high percentage of the U.S. and Other Canadian markets visit Ontario to 'tour the countryside/see Niagara Falls' ('viewing Niagara Falls particularly high for U.S. visitor)
- the type of accommodation used most often by all market groups is the home of a friend or relative
- other types of accommodation used most frequently are own cottage (Ontario resident and U.S.), campgrounds or trailer parks (Ontario, U.S. and Other Canadians) and motels/hotels (U.S. and Other Canadians)
- with the exception of the overseas traveller, the private automobile is the predominant means of travel to and within Ontario
- the highest percent of all travel occurs during the summer months (July 1st to September 30th)
- the fall and spring months receive approximately the same volume of visitation.

APPENDIX C

TRAVEL CHARACTERISTICS OF ONTARIO TRAVELLERS

BY ECONOMIC REGIONS

TABLE C-1

TRAVEL CHARACTERISTICS OF ONTARIO VACATION TRAVELLERS IN THE NORTHWESTERN ONTARIO ECONOMIC REGION

PARTICIPATION IN ACTIVITIES (IN USER DAYS)		ORIGIN* OF ONTARIO VISITORS		ACCOMMODATION USED		AVERAGE PARTY SIZE		MODE OF TRAVEL TO THE AREA	
ACTIVITY	%	ORIGIN	%	TYPE	%	PARTY SIZE	%	MODE	%
Boating	10.22	Lake St. Clair	7.38	Hotel/Motel	2.95	1	8.92	Automobile	75.20
Fishing	19.76	Lake Erie	11.72	Tourist Home	-	2	17.50	Rail	2.78
Hunting	12.88	Midwestern	2.03	Youth Hostel	-	3	-	Bus	.96
Cross Country Skiing	-	Niagara	3.24	Resort Lodge	1.70	4	59.60	Airplane	19.99
Alpine Skiing	-	Central Ontario	41.43	Outpost Establishment	-	5	8.74	Boat	1.07
Recreational Driving/Touring	2.17	Georgian Bay	-	Tourist Outfitter	-	6	5.23	Walk/Hike	
Recreational Snowmobiling	-	Lake Ontario	4.16	Home of Friend/ Relative	21.88	7		Other	
Hiking	8.49	Eastern Ontario	-	Private Hobby Farm	14.13	8 or more			
Zoo/Botanical Gardens/Nature Displays/Guided Nature Tour	1.28	Northeastern Ontario	13.66	Private Cottage	35.06				
Outing to View	2.86	Northwestern Ontario	16.06	Private Chalet/ Cabin	10.78				
Visit Historic Site or Display	1.08			Tent	.49				
Visit Museum/ Art Gallery	.39			Tenttrailer	7.01				
Sporting Event				Pickup Camper, Camperback	6.00				
Live Theatre/ Concert				Travel Trailer					
Attend Annually Scheduled Event				Mobile Home					
Golf				Mixed Accommodation					
Curling				Other					
Visit Private/ Rented Cottage	30.71								
Camping	10.17								

*By Economic Region.

TABLE C-1

TRAVEL CHARACTERISTICS OF VACATION TRAVELLERS IN THE NORTHEASTERN ONTARIO ECONOMIC REGION

PARTICIPATION IN ACTIVITIES (IN USER DAYS)		ORIGIN* OF ONTARIO VISITORS		ACCOMMODATION USED		AVERAGE PARTY SIZE		MODE OF TRAVEL TO THE AREA	
ACTIVITY	%	ORIGIN	%	TYPE	%	PARTY SIZE	%	MODE	%
Boating	16.06	Lake St. Clair	8.45	Hotel/Motel	1.31	1	6.68	Automobile	81.72
Fishing	13.33	Lake Erie	13.53	Tourist Home	.07	2	31.61	Rail	-
Hunting	4.65	Midwestern	5.02	Youth Hostel	-	3	17.55	Bus	11.43
Cross Country Skiing	-	Niagara	19.11	Resort Lodge	2.78	4	20.05	Airplane	1.48
Alpine Skiing	.04	Central Ontario	18.15	Outpost Establishment	.19	5	8.24	Boat	2.25
Recreational Driving/Touring	6.46	Georgian Bay	2.09	Tourist Outfitter	-	6	6.22	Walk/Hike	-
Recreational Snowmobiling	1.87	Lake Ontario	1.67	Home of Friend/ Relative	16.60	7	4.61	Other	3.12
Hiking	5.99	Eastern Ontario	4.53	Private Hobby Farm	3.95	8 or more	5.04		
Zoo/Botanical Gardens/Nature Displays/Guided Nature Tour	.56	Northeastern Ontario	25.30	Private Cottage	33.94				
Outing to View	11.09	Northwestern Ontario	2.13	Private Chalet/ Cabin	3.28				
Visit Historic Site or Display	.80			Tent	19.34				
Visit Museum/ Art Gallery	.09			Tenttrailer	10.77				
Sporting Event	1.45			Pickup Camper, Camperback	3.21				
Live Theatre/ Concert	.16			Travel Trailer	2.25				
Attend Annually Scheduled Event	.02			Mobile Home	-				
Golf	.11			Mixed Accommodation	1.57				
Curling	-			Other	.73				
Visit Private/ Rented Cottage	20.02								
Camping	17.32								

*By Economic Region.

TABLE C-1

TRAVEL CHARACTERISTICS OF ONTARIO VACATION TRAVELLERS IN THE GEORGIAN BAY ECONOMIC REGION

PARTICIPATION IN ACTIVITIES (IN USER DAYS)		ORIGIN* OF ONTARIO VISITORS		ACCOMMODATION USED		AVERAGE PARTY SIZE		MODE OF TRAVEL TO THE AREA	
ACTIVITY	%	ORIGIN	%	TYPE	%	PARTY SIZE	%	MODE	%
Boating	14.88	Lake St. Clair	10.29	Hotel/Motel	.99	1	5.52	Automobile	94.28
Fishing	10.26	Lake Erie	8.90	Tourist Home	.19	2	21.77	Rail	-
Hunting	1.28	Midwestern	6.91	Youth Hostel	-	3	17.07	Bus	1.91
Cross Country Skiing	-	Niagara	15.26	Resort Lodge	3.33	4	21.03	Airplane	-
Alpine Skiing	.62	Central Ontario	49.53	Outpost Establishment	.04	5	11.67	Boat	1.47
Recreational Driving/Touring	3.93	Georgian Bay	4.78	Tourist Outfitter	2.93	6	9.20	Walk/Hike	1.55
Recreational Snowmobiling	.31	Lake Ontario	.77	Home of Friend/ Relative	7.34	7	5.55	Other	.79
Hiking	4.78	Eastern Ontario	2.08	Private Hobby Farm	2.77	8 or more	8.20		
Zoo/Botanical Gardens/Nature Displays/Guided Nature Tour	1.27	Northeastern Ontario	1.58	Private Cottage	53.01				
Outing to View	5.75	Northwestern Ontario	-	Private Chalet/ Cabin	2.93				
Visit Historic Site or Display	.31			Tent	4.47				
Visit Museum/ Art Gallery	.32			Tenttrailer	2.98				
Sporting Event	.23			Pickup Camper, Camperback	.90				
Live Theatre/ Concert	.08			Travel Trailer	7.60				
Attend Annually Scheduled Event	.04			Mobile Home	.48				
Golf	.66			Mixed Accommodation	6.99				
Curling	-			Other	.99				
Visit Private/ Rented Cottage	50.24								
Camping	7.26								

*By Economic Region.

TABLE C-1

TRAVEL CHARACTERISTICS OF ONTARIO VACATION TRAVELLERS IN THE MIDWESTERN ONTARIO ECONOMIC REGION

PARTICIPATION IN ACTIVITIES (IN USER DAYS)

ACTIVITY	%
Boating	32.31
Fishing	2.37
Hunting	-
Cross Country Skiing	-
Alpine Skiing	.95
Recreational Driving/Touring	3.11
Recreational Snowmobiling	4.73
Hiking	6.34
Zoo/Botanical Gardens/Nature Displays/Guided Nature Tour	-
Outing to View	1.19
Visit Historic Site or Display	.48
Visit Museum/ Art Gallery	-
Sporting Event	-
Live Theatre/ Concert	.07
Attend Annually Scheduled Event	.32
Golf	-
Curling	-
Visit Private/ Rented Cottage	43.95
Camping	4.19

ORIGIN* OF ONTARIO VISITORS

ORIGIN	%
Lake St. Clair	7.23
Lake Erie	8.52
Midwestern	6.83
Niagara	10.04
Central Ontario	33.12
Georgian Bay	2.62
Lake Ontario	5.62
Eastern Ontario	12.40
Northeastern Ontario	14.34
Northwestern Ontario	-

ACCOMMODATION USED

TYPE	%
Hotel/Motel	1.53
Tourist Home	-
Youth Hostel	-
Resort Lodge	2.58
Outpost Establishment	-
Tourist Outfitter	-
Home of Friend/ Relative	22.91
Private Hobby Farm	-
Private Cottage	55.99
Private Chalet/ Cabin	-
Tent	.19
Tenttrailer	6.97
Pickup Camper, Camperback	9.83
Travel Trailer	-
Mobile Home	-
Mixed Accommodation	-
Other	-

AVERAGE PARTY SIZE

PARTY SIZE	%
1	6.01
2	26.68
3	14.50
4	24.92
5	15.14
6	3.61
7	-
8 or more	7.15

MODE OF TRAVEL TO THE AREA

MODE	%
Automobile	97.38
Rail	-
Bus	2.62
Airplane	-
Boat	-
Walk/Hike	-
Other	-

*By Economic Region.

TABLE C-1

TRAVEL CHARACTERISTICS OF ONTARIO VACATION TRAVELLERS IN THE LAKE ST. CLAIR ONTARIO ECONOMIC REGION

PARTICIPATION IN ACTIVITIES (IN USER DAYS)		ORIGIN* OF ONTARIO VISITORS		ACCOMMODATION USED		AVERAGE PARTY SIZE		MODE OF TRAVEL TO THE AREA	
ACTIVITY	%	ORIGIN	%	TYPE	%	PARTY SIZE	%	MODE	%
Boating	12.66	Lake St. Clair	42.33	Hotel/Motel	.47	1	.79	Automobile	99.66
Fishing	15.38	Lake Erie	26.29	Tourist Home	-	2	34.19	Rail	-
Hunting	-	Midwestern	-	Youth Hostel	-	3	22.07	Bus	.34
Cross Country Skiing	-	Niagara	11.83	Resort Lodge	-	4	16.81	Airplane	-
Alpine Skiing	-	Central Ontario	-	Outpost Establishment	-	5	15.02	Boat	-
Recreational Driving/Touring	2.88	Georgian Bay	2.40	Tourist Outfitter	-	6	2.50	Walk/Hike	-
Recreational Snowmobiling	-	Lake Ontario	1.50	Home of Friend/ Relative	5.75	7	2.27	Other	-
Hiking	6.78	Eastern Ontario	4.33	Private Hobby Farm	-	8 or more	6.35		
Zoo/Botanical Gardens/Nature Displays/Guided Nature Tour	.98	Northeastern Ontario	8.36	Private Cottage	44.20				
Outing to View	3.39	Northwestern Ontario	2.96	Private Chalet/ Cabin	2.24				
Visit Historic Site or Display	.18			Tent	2.26				
Visit Museum/ Art Gallery	-			Tenttrailer	.31				
Sporting Event	-			Pickup Camper, Camperback	-				
Live Theatre/ Concert	-			Travel Trailer	13.83				
Attend Annually Scheduled Event	.12			Mobile Home	-				
Golf	-			Mixed Accommodation	30.94				
Curling	-			Other	-				
Visit Private/ Rented Cottage	43.42								
Camping	14.20								

*By Economic Region.

TABLE C-1

TRAVEL CHARACTERISTICS OF ONTARIO VACATION TRAVELLERS IN THE LAKE ERIE ONTARIO ECONOMIC REGION

PARTICIPATION IN ACTIVITIES (IN USER DAYS)		ORIGIN* OF ONTARIO VISITORS		ACCOMMODATION USED		AVERAGE PARTY SIZE		MODE OF TRAVEL TO THE AREA	
ACTIVITY	%	ORIGIN	%	TYPE	%	PARTY SIZE	%	MODE	%
Boating	6.47	Lake St. Clair	2.16	Hotel/Motel	.50	1	9.90	Automobile	99.47
Fishing	16.53	Lake Erie	30.22	Tourist Home	-	2	26.34	Rail	-
Hunting	-	Midwestern	1.81	Youth Hostel	-	3	6.78	Bus	.53
Cross Country Skiing	-	Niagara	26.18	Resort Lodge	-	4	33.21	Airplane	-
Alpine Skiing	-	Central Ontario	17.46	Outpost Establishment	-	5	11.69	Boat	-
Recreational Driving/Touring	10.06	Georgian Bay	1.41	Tourist Outfitter	-	6	7.19	Walk/Hike	-
Recreational Snowmobiling	-	Lake Ontario	1.03	Home of Friend/ Relative	12.08	7	-	Other	-
Hiking	2.29	Eastern Ontario	6.34	Private Hobby Farm	-	8 or more	4.90		
Zoo/Botanical Gardens/Nature Displays/Guided Nature Tour	.73	Northeastern Ontario	13.41	Private Cottage	85.83				
Outing to View	-	Northwestern Ontario	-	Private Chalet/ Cabin	-				
Visit Historic Site or Display	.43			Tent	-				
Visit Museum/ Art Gallery	-			Tenttrailer	1.59				
Sporting Event	.94			Pickup Camper, Camperback	-				
Live Theatre/ Concert	.23			Travel Trailer	-				
Attend Annually Scheduled Event	-			Mobile Home	-				
Golf	1.60			Mixed Accommodation	-				
Curling	-			Other	-				
Visit Private/ Rented Cottage	46.03								
Camping	14.69								

*By Economic Region.

TABLE C-1

TRAVEL CHARACTERISTICS OF ONTARIO VACATION TRAVELLERS IN THE NIAGARA ONTARIO ECONOMIC REGION

PARTICIPATION IN ACTIVITIES (IN USER DAYS)		ORIGIN* OF ONTARIO VISITORS		ACCOMMODATION USED		AVERAGE PARTY SIZE		MODE OF TRAVEL TO THE AREA	
ACTIVITY	%	ORIGIN	%	TYPE	%	PARTY SIZE	%	MODE	%
Boating	25.11	Lake St. Clair	15.54	Hotel/Motel	9.16	1	21.17	Automobile	91.65
Fishing	9.64	Lake Erie	10.16	Tourist Home	-	2	14.17	Rail	-
Hunting	-	Midwestern	4.29	Youth Hostel	-	3	12.12	Bus	7.62
Cross Country Skiing	-	Niagara	22.91	Resort Lodge	-	4	19.03	Airplane	-
Alpine Skiing	-	Central Ontario	24.82	Outpost Establishment	-	5	14.01	Boat	-
Recreational Driving/Touring	4.78	Georgian Bay	1.55	Tourist Outfitter	-	6	11.03	Walk/Hike	-
Recreational Snowmobiling	.34	Lake Ontario	1.56	Home of Friend/ Relative	34.02	7	4.56	Other	.73
Hiking	6.53	Eastern Ontario	7.01	Private Hobby Farm	-	8 or more	3.94		
Zoo/Botanical Gardens/Nature Displays/Guided Nature Tour	7.25	Northeastern Ontario	9.74	Private Cottage	14.86				
Outing to View	7.38	Northwestern Ontario	2.43	Private Chalet/ Cabin	-				
Visit Historic Site or Display	3.18			Tent	.30				
Visit Museum/ Art Gallery	2.42			Tenttrailer	9.08				
Sporting Event	.19			Pickup Camper, Camperback	-				
Live Theatre/ Concert	.79			Travel Trailer	11.97				
Attend Annually Scheduled Event	.82			Mobile Home	-				
Golf	-			Mixed Accommodation	20.60				
Curling	-			Other	-				
Visit Private/ Rented Cottage	9.14								
Camping	22.42								

*By Economic Region.

TABLE C-1

TRAVEL CHARACTERISTICS OF ONTARIO VACATION TRAVELLERS IN THE CENTRAL ONTARIO ECONOMIC REGION

PARTICIPATION IN ACTIVITIES (IN USER DAYS)		ORIGIN* OF ONTARIO VISITORS		ACCOMMODATION USED		AVERAGE PARTY SIZE		MODE OF TRAVEL TO THE AREA	
ACTIVITY	%	ORIGIN	%	TYPE	%	PARTY SIZE	%	MODE	%
Boating	13.60	Lake St. Clair	4.88	Hotel/Motel	13.95	1	19.59	Automobile	88.91
Fishing	18.51	Lake Erie	4.83	Tourist Home	-	2	34.87	Rail	-
Hunting	.93	Midwestern	8.30	Youth Hostel	-	3	19.39	Bus	2.58
Cross Country Skiing	-	Niagara	6.35	Resort Lodge	-	4	5.55	Airplane	.65
Alpine Skiing	-	Central Ontario	38.18	Outpost Establishment	-	5	6.33	Boat	-
Recreational Driving/Touring	4.89	Georgian Bay	4.39	Tourist Outfitter	2.84	6	9.00	Walk/Hike	-
Recreational Snowmobiling	-	Lake Ontario	4.50	Home of Friend/ Relative	41.34	7	1.76	Other	7.86
Hiking	3.19	Eastern Ontario	8.42	Private Hobby Farm	-	8 or more	3.51		
Zoo/Botanical Gardens/Nature Displays/Guided Nature Tour	.80	Northeastern Ontario	17.41	Private Cottage	23.57				
Outing to View	1.50	Northwestern Ontario	3.74	Private Chalet/ Cabin	-				
Visit Historic Site or Display	1.64			Tent	6.59				
Visit Museum/ Art Gallery	1.58			Tenttrailer	5.52				
Sporting Event	.78			Pickup Camper, Camperback	-				
Live Theatre/ Concert	1.13			Travel Trailer	-				
Attend Annually Scheduled Event	7.81			Mobile Home	5.42				
Golf	.30			Mixed Accommodation	-				
Curling	-			Other	.76				
Visit Private/ Rented Cottage	36.85								
Camping	6.96								

*By Economic Region.

TABLE C-1

TRAVEL CHARACTERISTICS OF ONTARIO VACATION TRAVELLERS IN THE LAKE ONTARIO ECONOMIC REGION

PARTICIPATION IN ACTIVITIES (IN USER DAYS)		ORIGIN* OF ONTARIO VISITORS		ACCOMMODATION USED		AVERAGE PARTY SIZE		MODE OF TRAVEL TO THE AREA	
ACTIVITY	%	ORIGIN	%	TYPE	%	PARTY SIZE	%	MODE	%
Boating	27.55	Lake St. Clair	1.10	Hotel/Motel	.25	1	4.96	Automobile	86.84
Fishing	13.17	Lake Erie	3.49	Tourist Home	.58	2	17.42	Rail	-
Hunting	.78	Midwestern	1.53	Youth Hostel	-	3	11.06	Bus	10.90
Cross Country Skiing	-	Niagara	14.37	Resort Lodge	6.40	4	28.82	Airplane	-
Alpine Skiing	-	Central Ontario	65.17	Outpost Establishment	.47	5	13.51	Boat	1.10
Recreational Driving/Touring	3.65	Georgian Bay	.61	Tourist Outfitter	-	6	7.02	Walk/Hike	.04
Recreational Snowmobiling	1.26	Lake Ontario	7.42	Home of Friend/ Relative	1.46	7	1.25	Other	1.12
Hiking	4.37	Eastern Ontario	3.10	Private Hobby Farm	.34	8 or more	15.95		
Zoo/Botanical Gardens/Nature Displays/Guided Nature Tour	.67	Northeastern Ontario	3.19	Private Cottage	74.03				
Outing to View	1.62	Northwestern Ontario	-	Private Chalet/ Cabin	.50				
Visit Historic Site or Display	.25			Tent	2.56				
Visit Museum/ Art Gallery	.21			Tenttrailer	.23				
Sporting Event	.11			Pickup Camper, Camperback	-				
Live Theatre/ Concert	.07			Travel Trailer	1.24				
Attend Annually Scheduled Event	-			Mobile Home	2.31				
Golf	.36			Mixed Accommodation	4.39				
Curling	-			Other	5.24				
Visit Private/ Rented Cottage	42.84								
Camping	3.08								

*By Economic Region.

TABLE C-1

TRAVEL CHARACTERISTICS OF ONTARIO VACATION TRAVELLERS IN THE EASTERN ONTARIO ECONOMIC REGION

PARTICIPATION IN ACTIVITIES (IN USER DAYS)		ORIGIN* OF ONTARIO VISITORS		ACCOMMODATION USED		AVERAGE PARTY SIZE		MODE OF TRAVEL TO THE AREA	
ACTIVITY	%	ORIGIN	%	TYPE	%	PARTY SIZE	%	MODE	%
Boating	19.15	Lake St. Clair	7.10	Hotel/Motel	7.45	1	12.57	Automobile	96.35
Fishing	15.19	Lake Erie	6.38	Tourist Home	-	2	18.28	Rail	.54
Hunting	3.36	Midwestern	3.60	Youth Hostel	-	3	17.11	Bus	.90
Cross Country Skiing	-	Niagara	11.99	Resort Lodge	-	4	16.05	Airplane	.39
Alpine Skiing	-	Central Ontario	31.41	Outpost Establishment	-	5	19.32	Boat	.69
Recreational Driving/Touring	7.58	Georgian Bay	2.02	Tourist Outfitter	-	6	5.13	Walk/Hike	.75
Recreational Snowmobiling	.05	Lake Ontario	3.19	Home of Friend/ Relative	17.85	7	2.72	Other	.37
Hiking	3.47	Eastern Ontario	26.31	Private Hobby Farm	-	8 or more	8.81		
Zoo/Botanical Gardens/Nature Displays/Guided Nature Tour	1.13	Northeastern Ontario	7.14	Private Cottage	45.03				
Outing to View	1.71	Northwestern Ontario	.87	Private Chalet/ Cabin	15.86				
Visit Historic Site or Display	2.59			Tent	.40				
Visit Museum/ Art Gallery	1.14			Tenttrailer	4.73				
Sporting Event	1.66			Pickup Camper, Camperback	1.78				
Live Theatre/ Concert	7.50			Travel Trailer	3.28				
Attend Annually Scheduled Event	6.51			Mobile Home	1.43				
Golf	3.61			Mixed Accommodation	.20				
Curling	-			Other	1.98				
Visit Private/ Rented Cottage	32.62								
Camping	8.59								

*By Economic Region.

TABLE C-2

TRAVEL CHARACTERISTICS OF ONTARIO WEEKEND TRAVELLERS IN THE NORTHWESTERN ONTARIO ECONOMIC REGION

PARTICIPATION IN ACTIVITIES (IN USER DAYS)		ORIGIN* OF ONTARIO VISITORS		ACCOMMODATION USED		AVERAGE PARTY SIZE		MODE OF TRAVEL TO THE AREA	
ACTIVITY	%	ORIGIN	%	TYPE	%	PARTY SIZE	%	MODE	%
Boating	25.89	Lake St. Clair	-	Hotel/Motel	8.48	1	-	Automobile	80.43
Fishing	19.04	Lake Erie	-	Tourist Home	-	2	43.05	Rail	1.43
Hunting	6.03	Midwestern	.98	Youth Hostel	-	3	-	Bus	.78
Cross Country Skiing	.67	Niagara	3.14	Resort Lodge	-	4	56.95	Airplane	-
Alpine Skiing	-	Central Ontario	9.30	Outpost Establishment	-	5	-	Boat	6.44
Recreational Driving/Touring	6.38	Georgian Bay	-	Tourist Outfitter	-	6	-	Walk/Hike	2.38
Recreational Snowmobiling	4.10	Lake Ontario	.20	Home of Friend/ Relative	24.78	7	-	Other	8.53
Hiking	1.10	Eastern Ontario	2.15	Private Hobby Farm	-	8 or more	-		
Zoo/Botanical Gardens/Nature Displays/Guided Nature Tour	1.92	Northeastern Ontario	10.64	Private Cottage	21.17				
Outing to View	.44	Northwestern Ontario	73.60	Private Chalet/ Cabin	5.18				
Visit Historic Site or Display	-			Tent	21.03				
Visit Museum/ Art Gallery	-			Tenttrailer	2.10				
Sporting Event	3.18			Pickup Camper, Camperback	15.07				
Live Theatre/ Concert	-			Travel Trailer	-				
Attend Annually Scheduled Event	.96			Mobile Home	-				
Golf	.72			Mixed Accommodation	-				
Curling	.94			Other	2.17				
Visit Private/ Rented Cottage	15.87								
Camping	11.76								

*By Economic Region.

TABLE C-2

TRAVEL CHARACTERISTICS OF ONTARIO WEEKEND TRAVELLERS IN THE NORTHEASTERN ONTARIO ECONOMIC REGION

PARTICIPATION IN ACTIVITIES (IN USER DAYS)		ORIGIN* OF ONTARIO VISITORS		ACCOMMODATION USED		AVERAGE PARTY SIZE		MODE OF TRAVEL TO THE AREA	
ACTIVITY	%	ORIGIN	%	TYPE	%	PARTY SIZE	%	MODE	%
Boating	15.16	Lake St. Clair	2.74	Hotel/Motel	5.11	1	-	Automobile	85.6
Fishing	15.94	Lake Erie	4.46	Tourist Home	-	2	12.52	Rail	.44
Hunting	2.66	Midwestern	2.13	Youth Hostel	-	3	42.72	Bus	4.86
Cross Country Skiing	.40	Niagara	5.46	Resort Lodge	1.64	4	6.24	Airplane	.08
Alpine Skiing	-	Central Ontario	28.38	Outpost Establishment	.70	5	20.73	Boat	2.12
Recreational Driving/Touring	8.86	Georgian Bay	2.17	Tourist Outfitter	1.80	6	3.37	Walk/Hike	-
Recreational Snowmobiling	3.00	Lake Ontario	1.27	Home of Friend/ Relative	26.06	7	3.92	Other	6.90
Hiking	10.18	Eastern Ontario	3.80	Private Hobby Farm	-	8 or more	10.50		
Zoo/Botanical Gardens/Nature Displays/Guided Nature Tour	1.74	Northeastern Ontario	48.10	Private Cottage	32.48				
Outing to View	7.00	Northwestern Ontario	1.48	Private Chalet/ Cabin	2.13				
Visit Historic Site or Display	1.04			Tent	14.32				
Visit Museum/ Art Gallery	.21			Tenttrailer	5.45				
Sporting Event	1.78			Pickup Camper, Camperback	3.59				
Live Theatre/ Concert	.14			Travel Trailer	.99				
Attend Annually Scheduled Event	.75			Mobile Home	1.39				
Golf	.83			Mixed Accommodation	2.11				
Curling	.44			Other	2.22				
Visit Private/ Rented Cottage	16.09								
Camping	13.78								

*By Economic Region.

TABLE C-2

TRAVEL CHARACTERISTICS OF ONTARIO WEEKEND TRAVELLERS IN THE GEORGIAN BAY ONTARIO ECONOMIC REGION

PARTICIPATION IN ACTIVITIES (IN USER DAYS)		ORIGIN* OF ONTARIO VISITORS		ACCOMMODATION USED		AVERAGE PARTY SIZE		MODE OF TRAVEL TO THE AREA	
ACTIVITY	%	ORIGIN	%	TYPE	%	PARTY SIZE	%	MODE	%
Boating	15.45	Lake St. Clair	2.71	Hotel/Motel	7.78	1	11.02	Automobile	91.32
Fishing	11.76	Lake Erie	3.56	Tourist Home	-	2	42.49	Rail	1.46
Hunting	1.88	Midwestern	8.83	Youth Hostel	-	3	6.44	Bus	2.83
Cross Country Skiing	.98	Niagara	9.31	Resort Lodge	3.16	4	13.76	Airplane	-
Alpine Skiing	2.97	Central Ontario	67.79	Outpost Establishment	-	5	10.41	Boat	3.15
Recreational Driving/Touring	7.73	Georgian Bay	4.18	Tourist Outfitter	-	6	6.45	Walk/Hike	-
Recreational Snowmobiling	2.81	Lake Ontario	1.02	Home of Friend/Relative	14.10	7	1.51	Other	1.24
Hiking	7.07	Eastern Ontario	1.02	Private Hobby Farm	1.22	8 or more	8.48		
Zoo/Botanical Gardens/Nature Displays/Guided Nature Tour	1.40	Northeastern Ontario	1.53	Private Cottage	53.09				
Outing to View	4.98	Northwestern Ontario	.07	Private Chalet/Cabin	1.22				
Visit Historic Site or Display	.55			Tent	5.08				
Visit Museum/Art Gallery	.16			Tenttrailer	7.33				
Sporting Event	.56			Pickup Camper, Camperback	1.53				
Live Theatre/Concert	.31			Travel Trailer	3.67				
Attend Annually Scheduled Event	.46			Mobile Home	1.33				
Golf	.64			Mixed Accommodation	-				
Curling	-			Other	.49				
Visit Private/Rented Cottage	31.74								
Camping	8.68								

*By Economic Region.

TABLE C-2

TRAVEL CHARACTERISTICS OF ONTARIO WEEKEND TRAVELLERS IN THE MIDWESTERN ONTARIO ECONOMIC REGION

PARTICIPATION IN ACTIVITIES (IN USER DAYS)		ORIGIN* OF ONTARIO VISITORS		ACCOMMODATION USED		AVERAGE PARTY SIZE		MODE OF TRAVEL TO THE AREA	
ACTIVITY	%	ORIGIN	%	TYPE	%	PARTY SIZE	%	MODE	%
Boating	6.21	Lake St. Clair	6.41	Hotel/Motel	11.06	1	-	Automobile	95.52
Fishing	5.79	Lake Erie	10.40	Tourist Home	.37	2	30.48	Rail	.86
Hunting	.17	Midwestern	19.19	Youth Hostel	-	3	8.97	Bus	1.24
Cross Country Skiing	1.13	Niagara	13.21	Resort Lodge	-	4	19.08	Airplane	-
Alpine Skiing	-	Central Ontario	41.31	Outpost Establishment	-	5	39.89	Boat	1.25
Recreational Driving/Touring	16.72	Georgian Bay	3.20	Tourist Outfitter	-	6	1.59	Walk/Hike	-
Recreational Snowmobiling	3.83	Lake Ontario	2.40	Home of Friend/ Relative	41.18	7	-	Other	1.12
Hiking	11.44	Eastern Ontario	2.22	Private Hobby Farm	-	8 or more	-		
Zoo/Botanical Gardens/Nature Displays/Guided Nature Tour	2.68	Northeastern Ontario	1.65	Private Cottage	24.33				
Outing to View	2.84	Northwestern Ontario	-	Private Chalet/ Cabin	-				
Visit Historic Site or Display	.87			Tent	7.02				
Visit Museum/ Art Gallery	1.23			Tenttrailer	7.24				
Sporting Event	7.22			Pickup Camper, Camperback	1.48				
Live Theatre/ Concert	3.42			Travel Trailer	5.47				
Attend Annually Scheduled Event	3.44			Mobile Home	-				
Golf	2.27			Mixed Accommodation	-				
Curling	.35			Other	1.84				
Visit Private/ Rented Cottage	15.97								
Camping	14.39								

*By Economic Region.

TABLE C-2

TRAVEL CHARACTERISTICS OF ONTARIO WEEKEND TRAVELLERS IN THE LAKE ST. CLAIR ONTARIO ECONOMIC REGION

PARTICIPATION IN ACTIVITIES (IN USER DAYS)		ORIGIN* OF ONTARIO VISITORS		ACCOMMODATION USED		AVERAGE PARTY SIZE		MODE OF TRAVEL TO THE AREA	
ACTIVITY	%	ORIGIN	%	TYPE	%	PARTY SIZE	%	MODE	%
Boating	9.29	Lake St. Clair	30.14	Hotel/Motel	6.12	1	-	Automobile	88.03
Fishing	11.28	Lake Erie	20.79	Tourist Home	-	2	-	Rail	.80
Hunting	-	Midwestern	6.90	Youth Hostel	-	3	23.86	Bus	5.01
Cross Country Skiing	-	Niagara	5.40	Resort Lodge	-	4	15.51	Airplane	.27
Alpine Skiing	-	Central Ontario	32.70	Outpost Establishment	-	5	-	Boat	2.63
Recreational Driving/Touring	20.31	Georgian Bay	1.59	Tourist Outfitter	-	6	-	Walk/Hike	.40
Recreational Snowmobiling	.98	Lake Ontario	.96	Home of Friend/ Relative	54.86	7	-	Other	2.86
Hiking	4.43	Eastern Ontario	1.03	Private Hobby Farm	-	8 or more	60.63		
Zoo/Botanical Gardens/Nature Displays/Guided Nature Tour	4.52	Northeastern Ontario	.50	Private Cottage	4.17				
Outing to View	3.14	Northwestern Ontario	-	Private Chalet/ Cabin	-				
Visit Historic Site or Display	.85			Tent	6.29				
Visit Museum/ Art Gallery	2.63			Tenttrailer	12.72				
Sporting Event	2.26			Pickup Camper, Camperback	1.98				
Live Theatre/ Concert	2.12			Travel Trailer	12.72				
Attend Annually Scheduled Event	1.14			Mobile Home	-				
Golf	4.57			Mixed Accommodation	-				
Curling	.42			Other	2.41				
Visit Private/ Rented Cottage	11.78								
Camping	19.45								

*By Economic Region.

TABLE C-2

TRAVEL CHARACTERISTICS OF ONTARIO WEEKEND TRAVELLERS IN THE LAKE ERIE ONTARIO ECONOMIC REGION

PARTICIPATION IN ACTIVITIES (IN USER DAYS)		ORIGIN* OF ONTARIO VISITORS		ACCOMMODATION USED		AVERAGE PARTY SIZE		MODE OF TRAVEL TO THE AREA	
ACTIVITY	%	ORIGIN	%	TYPE	%	PARTY SIZE	%	MODE	%
Boating	8.22	Lake St. Clair	11.96	Hotel/Motel	5.45	1	-	Automobile	89.78
Fishing	.61	Lake Erie	17.01	Tourist Home	-	2	50.62	Rail	2.89
Hunting	1.96	Midwestern	8.43	Youth Hostel	-	3	20.53	Bus	3.04
Cross Country Skiing	-	Niagara	16.60	Resort Lodge	-	4	26.40	Airplane	-
Alpine Skiing	-	Central Ontario	36.35	Outpost Establishment	-	5	2.45	Boat	2.06
Recreational Driving/Touring	27.28	Georgian Bay	3.75	Tourist Outfitter	-	6	-	Walk/Hike	.42
Recreational Snowmobiling	1.29	Lake Ontario	1.33	Home of Friend/ Relative	53.16	7	-	Other	1.81
Hiking	5.29	Eastern Ontario	2.41	Private Hobby Farm	5.38	8 or more	-		
Zoo/Botanical Gardens/Nature Displays/Guided Nature Tour	5.83	Northeastern Ontario	1.65	Private Cottage	9.91				
Outing to View	7.49	Northwestern Ontario	.25	Private Chalet/ Cabin	1.34				
Visit Historic Site or Display	1.47			Tent	13.27				
Visit Museum/ Art Gallery	.33			Tenttrailer	2.47				
Sporting Event	3.19			Pickup Camper, Camperback	-				
Live Theatre/ Concert	.38			Travel Trailer	8.17				
Attend Annually Scheduled Event	1.81			Mobile Home	.84				
Golf	3.60			Mixed Accommodation	-				
Curling	-			Other	-				
Visit Private/ Rented Cottage	13.96								
Camping	18.18								

*By Economic Region.

TABLE C-2

TRAVEL CHARACTERISTICS OF ONTARIO WEEKEND TRAVELLERS IN THE NIAGARA ONTARIO ECONOMIC REGION

PARTICIPATION IN ACTIVITIES (IN USER DAYS)		ORIGIN* OF ONTARIO VISITORS		ACCOMMODATION USED		AVERAGE PARTY SIZE		MODE OF TRAVEL TO THE AREA	
ACTIVITY	%	ORIGIN	%	TYPE	%	PARTY SIZE	%	MODE	%
Boating	3.34	Lake St. Clair	7.33	Hotel/Motel	32.41	1	16.16	Automobile	94.02
Fishing	5.43	Lake Erie	8.35	Tourist Home	.14	2	20.79	Rail	.51
Hunting	-	Midwestern	4.21	Youth Hostel	-	3	15.04	Bus	4.82
Cross Country Skiing	-	Niagara	20.22	Resort Lodge	.58	4	30.97	Airplane	-
Alpine Skiing	.87	Central Ontario	49.47	Outpost Establishment	-	5	1.91	Boat	.65
Recreational Driving/Touring	25.75	Georgian Bay	3.70	Tourist Outfitter	-	6	15.13	Walk/Hike	-
Recreational Snowmobiling	.63	Lake Ontario	1.77	Home of Friend/ Relative	50.19	7	-	Other	-
Hiking	5.61	Eastern Ontario	2.98	Private Hobby Farm	-	8 or more	-		
Zoo/Botanical Gardens/Nature Displays/Guided Nature Tour	8.64	Northeastern Ontario	1.62	Private Cottage	5.21				
Outing to View	2.63	Northwestern Ontario	.36	Private Chalet/ Cabin	-				
Visit Historic Site or Display	4.83			Tent	1.90				
Visit Museum/ Art Gallery	3.80			Tenttrailer	6.77				
Sporting Event	3.21			Pickup Camper, Camperback	-				
Live Theatre/ Concert	3.24			Travel Trailer	2.79				
Attend Annually Scheduled Event	2.19			Mobile Home	-				
Golf	3.68			Mixed Accommodation	-				
Curling	-			Other	-				
Visit Private/ Rented Cottage	8.66								
Camping	15.59								

*By Economic Region.

TABLE C-2

TRAVEL CHARACTERISTICS OF ONTARIO WEEKEND TRAVELLERS IN THE CENTRAL ONTARIO ECONOMIC REGION

PARTICIPATION IN ACTIVITIES (IN USER DAYS)		ORIGIN* OF ONTARIO VISITORS		ACCOMMODATION USED		AVERAGE PARTY SIZE		MODE OF TRAVEL TO THE AREA	
ACTIVITY	%	ORIGIN	%	TYPE	%	PARTY SIZE	%	MODE	%
Boating	3.71	Lake St. Clair	5.61	Hotel/Motel	20.33	1	.71	Automobile	80.25
Fishing	5.20	Lake Erie	8.86	Tourist Home	-	2	51.67	Rail	1.81
Hunting	-	Midwestern	8.86	Youth Hostel	-	3	25.02	Bus	11.97
Cross Country Skiing	.79	Niagara	10.85	Resort Lodge	-	4	9.61	Airplane	1.80
Alpine Skiing	.45	Central Ontario	46.03	Outpost Establishment	-	5	2.13	Boat	.76
Recreational Driving/Touring	11.64	Georgian Bay	4.70	Tourist Outfitter	-	6	6.98	Walk/Hike	.30
Recreational Snowmobiling	2.37	Lake Ontario	2.98	Home of Friend/ Relative	53.52	7	-	Other	3.11
Hiking	6.29	Eastern Ontario	7.50	Private Hobby Farm	-	8 or more	3.86		
Zoo/Botanical Gardens/Nature Displays/Guided Nature Tour	2.51	Northeastern Ontario	4.62	Private Cottage	6.71				
Outing to View	9.13	Northwestern Ontario	-	Private Chalet/ Cabin	-				
Visit Historic Site or Display	2.81			Tent	2.13				
Visit Museum/ Art Gallery	5.98			Tenttrailer	5.39				
Sporting Event	3.71			Pickup Camper, Camperback	.06				
Live Theatre/ Concert	6.59			Travel Trailer	1.09				
Attend Annually Scheduled Event	11.80			Mobile Home	-				
Golf	3.95			Mixed Accommodation	-				
Curling	-			Other	10.78				
Visit Private/ Rented Cottage	8.50								
Camping	14.57								

*By Economic Region.

TABLE C-2

TRAVEL CHARACTERISTICS OF ONTARIO WEEKEND TRAVELLERS IN THE LAKE ONTARIO ECONOMIC REGION

PARTICIPATION IN ACTIVITIES (IN USER DAYS)		ORIGIN* OF ONTARIO VISITORS		ACCOMMODATION USED		AVERAGE PARTY SIZE		MODE OF TRAVEL TO THE AREA	
ACTIVITY	%	ORIGIN	%	TYPE	%	PARTY SIZE	%	MODE	%
Boating	23.63	Lake St. Clair	1.16	Hotel/Motel	3.15	1	44.48	Automobile	91.37
Fishing	13.61	Lake Erie	.61	Tourist Home	.49	2	16.90	Rail	.57
Hunting	2.16	Midwestern	2.57	Youth Hostel	-	3	11.53	Bus	4.37
Cross Country Skiing	.58	Niagara	5.23	Resort Lodge	2.20	4	10.50	Airplane	-
Alpine Skiing	.21	Central Ontario	76.80	Outpost Establishment	-	5	13.49	Boat	.82
Recreational Driving/Touring	6.62	Georgian Bay	1.06	Tourist Outfitter	-	6	-	Walk/Hike	.34
Recreational Snowmobiling	3.74	Lake Ontario	8.12	Home of Friend/ Relative	14.13	7	-	Other	2.53
Hiking	3.71	Eastern Ontario	3.62	Private Hobby Farm	1.74	8 or more	3.10		
Zoo/Botanical Gardens/Nature Displays/Guided Nature Tour	.36	Northeastern Ontario	.70	Private Cottage	53.88				
Outing to View	4.18	Northwestern Ontario	.12	Private Chalet/ Cabin	4.21				
Visit Historic Site or Display	.42			Tent	8.06				
Visit Museum/ Art Gallery	.05			Tenttrailer	4.19				
Sporting Event	2.03			Pickup Camper, Camperback	2.84				
Live Theatre/ Concert	.22			Travel Trailer	1.93				
Attend Annually Scheduled Event	.22			Mobile Home	1.33				
Golf	.54			Mixed Accommodation	1.25				
Curling	.03			Other	.62				
Visit Private/ Rented Cottage	30.24								
Camping	7.43								

*By Economic Region.

TABLE C-2

TRAVEL CHARACTERISTICS OF ONTARIO WEEKEND TRAVELLERS IN THE EASTERN ONTARIO ECONOMIC REGION

PARTICIPATION IN ACTIVITIES (IN USER DAYS)		ORIGIN* OF ONTARIO VISITORS		ACCOMMODATION USED		AVERAGE PARTY SIZE		MODE OF TRAVEL TO THE AREA	
ACTIVITY	%	ORIGIN	%	TYPE	%	PARTY SIZE	%	MODE	%
Boating	10.38	Lake St. Clair	.74	Hotel/Motel	16.79	1	20.47	Automobile	84.14
Fishing	10.84	Lake Erie	2.60	Tourist Home	.24	2	24.87	Rail	5.19
Hunting	2.78	Midwestern	3.67	Youth Hostel	-	3	3.75	Bus	3.96
Cross Country Skiing	.19	Niagara	6.64	Resort Lodge	-	4	12.41	Airplane	2.64
Alpine Skiing	.59	Central Ontario	35.18	Outpost Establishment	-	5	3.58	Boat	2.81
Recreational Driving/Touring	14.46	Georgian Bay	1.81	Tourist Outfitter	-	6	5.96	Walk/Hike	-
Recreational Snowmobiling	2.87	Lake Ontario	4.35	Home of Friend/ Relative	35.54	7	28.96	Other	1.26
Hiking	3.10	Eastern Ontario	38.80	Private Hobby Farm	.73	8 or more	-		
Zoo/Botanical Gardens/Nature Displays/Guided Nature Tour	1.85	Northeastern Ontario	6.21	Private Cottage	26.00				
Outing to View	1.16	Northwestern Ontario	-	Private Chalet/ Cabin	2.10				
Visit Historic Site or Display	6.56			Tent	7.30				
Visit Museum/ Art Gallery	7.06			Tenttrailer	2.60				
Sporting Event	3.02			Pickup Camper, Camperback	2.28				
Live Theatre/ Concert	1.70			Travel Trailer	.56				
Attend Annually Scheduled Event	1.34			Mobile Home	-				
Golf	1.35			Mixed Accommodation	2.45				
Curling	.30			Other	3.41				
Visit Private/ Rented Cottage	22.31								
Camping	8.11								

*By Economic Region.

APPENDIX D

DEFINITIONS OF SPECIFIC TOURISM ACTIVITIES

APPENDIX D

DEFINITIONS OF SPECIFIC TOURISM ACTIVITIES

1. Specialists: This category includes activity type segments which are centered around a single activity as opposed to a group of activities. These segments may utilize many supply components, and other activities may be engaged in; however, the quality of the experience is judged in terms of the quality of the single central activity.

   Specialists were divided in two sub-categories:

   A. Recreation oriented
   B. Non-recreation oriented

2. Destination pre-determined: This category groups activity types for which the location of their activity is pre-determined. This category includes the following sub-categories:

   A. Business: the primary trip purpose is business and is sponsored. This activity type may have an important secondary trip purpose and may be accompanied by family or other parties not concerned with the business trip purpose.
   B. Second residence: this sub-category includes activity types whose primary trip purpose is the second residence environment and related experiences.
   C. Visit friends and relatives: this sub-category includes all activity types whose "stated" trip purpose is to visit friends and relatives. It is recognized that activity types within this sub-category may engage in numerous secondary activities. Moreover, it is generally suspected that the available research studies, which indicate a high visit friends and relatives component as the stated trip purpose, may be misleading, in that the stated visit friends and relatives purpose is likely to be a secondary trip purpose.

3. Location oriented: This category includes activity segments for which the destination is not pre-determined, but are location oriented. The sub-categories included are:

A. Resort visit

B. Camping

C. Urban experience

4. Touring: Touring is defined in the narrow sense of individuals, or groups, who travel significant distances to more than one location and tend to experience a range of activities prominent to the areas through which they travel. The category does not include activity segments who group together to utilize a common transportation system to reach a specific activity location (i.e., bus to ski area).

The sub-categories within this category define the nature of market groups (as opposed to being activity related) because, while some minor development activities may be supported by the touring category, the potential lies in packaging and marketing existing development; or development strategies which relate more specifically to other activity types.

The "activity segments" and "sub-segments" are defined as follows:

A. Boating

   i. Large sailing craft: deep draft, fixed keel, exceed 26 feet, some housekeeping and sleeping facilities.

   ii. Cruisers: exceed 26 feet and have facility capacity for extended cruising (i.e., 3 days).

   iii. Houseboats: includes both pontoon and hull boats, facilities for extended cruising.

   iv. Canoe: includes only the use of canoes for trip or touring purposes.

   v. Outboard touring: may be "trailed" or moored at a permanent location, less than 26 feet, do not contain housekeeping facilities.

   vi. Casual: outboards, canoes, sailboats related to other activity segments (i.e., second residence or fishing).

B. Fishing

   i. Trip - Road Access: a planned trip of more than one day; road access and primarily commercial accommodation.

   ii. Trip - Wilderness: a planned trip of more than one day; access to fishing location by plane or portaging, includes both commercial (fishing camps) and non-commercial (camping) accommodation.

iii. Ice: implies travel of some distance, use of shelter, day or longer trip.

iv. Casual: includes local day trips, fishing as part of cottage experience, etc.

C. Hunting

i. Trip - Big Game: includes only planned trips involving some travel and a trip duration of more than two days. Accommodation may be commercial or second residence.

ii. Trip - Wild Fowl: includes only planned trips involving some travel and a trip duration of more than one day.

iii. Small Game: usually casual, a one day experience in local area.

D. Skiing

i. Downhill: uses developed ski facilities, usually involves some travel, and may be one or more days.

ii. Cross Country: may or may not use designated routes, usually one day, tends to be local.

E. Other Outdoor Recreation

i. Nature-based: activity type segments whose activity is dependent on a natural resource. The attractiveness of the resource may be enhanced by development, but the essential component of the experience is the quality of the natural resource.

ii. Facility-oriented: activity is outdoors and utilizes some natural resource, but is organized and requires some facility development.

F. Viewing Natural Attractions: involves some travel to view an attraction which has sufficient appeal to be the primary purpose of the trip.

G. Shopping: implies a planned activity, usually involving some travel, usually to seek specialty or shopping goods.

H. Eating Out: implies a planned occasion, usually involving some travel, for either a quality experience or for specialty foods.

I. Special Events: temporary or organized for limited time duration, usually on a regular basis (i.e., County fairs), but may be a single occasion (i.e., rock festival), tends to have a local or regional orientation. Includes fairs, festivals, etc.

J. Man-made Attractions: attractions are of a permanent or semi-permanent nature as opposed to the temporary nature of events. It is recognized that from a consumer need viewpoint, the appeal of attractions is either entertainment or educational, or a combination thereof. However, for the purposes of this plan, the activity segments have been defined to describe the nature of attractions.

   i. Industrial: developments which may have tourism appeal, but whose primary purpose is the production of goods or services (i.e., factories, hydro plants, etc.).
   ii. Educational: attractions which can be perceived to have significant educational value (i.e., museums, zoos, etc.).
   iii. Entertainment: attractions which are clearly perceived as having primarily entertainment appeal (i.e., theatre, etc.).
   iv. Historical: attractions which depend on their historical significance for their appeal to tourists (i.e., Upper Canada Village).

K. En Route Elsewhere: individuals passing through the province with destinations outside of the province.

L. Business Task: "Task" simply refers to a job or part of a job which requires travel within Ontario.

   i. Route Task: includes business tasks of a routine nature involving travel along a prescribed and usually repeated route (i.e., salesmen, etc.).
   ii. Single Task: includes business tasks of an isolated nature usually by executives or specialists (i.e., a foreign businessman or computer expert visiting an Ontario-based Canadian affiliate company).

M. Business Event

i. Convention: large meetings (200 plus), usually sponsored by an organizing agent of an industry or specific segment of society, as opposed to an individual company.

ii. Small meetings: usually sponsored by individual companies or regional associations, relatively small groups.

N. Second Residence

i. Lakeshore: includes all second residences for which the primary appeal is the water-oriented location and related activities. It is composed primarily of cottages on lakeshore lots; however, water-oriented condominiums and so called "back-lot" locations are also included.

ii. Upland: includes second residences which are not on water but are in water-oriented locations.

iii. Special purpose: usually related to some "specialist" activity, a form of accommodation related to other primary activities. Also includes weekend farms, "retreat" cabins, etc.

O. Visiting Friends and Relatives

i. Passive: primary purpose is to visit, and few secondary activities are involved.

ii. Active: visiting is secondary to other activities, or the visiting aspect takes the form of participation with friends and relatives in other activities.

P. Resort Vacation

i. Resort hotel: experience is very social, activities are oriented toward facility-oriented outdoor recreation (i.e., golf, tennis), experience includes quality food and evening activity, accommodation is expected to be fairly sophisticated.

ii. Wilderness (road access): very similar total experience to the resort hotel, however, activities tend to be less organized and more nature-oriented (i.e., hiking, canoeing), more rustic accommodations acceptable, wilderness location important.

iii. Special purpose: includes any resort designed for a specific single activity or purpose (i.e., hockey schools, health resorts, tennis resort, etc.).

Q. Camping

i. Destination: camper travels to chosen campsite and stays at that site for the duration of his holiday. Campsites are usually fully serviced.

ii. Wilderness: camper tends to a destination camper, however, seeks a wilderness location which may not have any services or even be designated as a campsite.

iii. Touring: primary trip purpose is touring, camping is essentially a form of economical accommodation which may have varying degrees of intrinsic experience value.

R. Urban Experience: This segment travels some distance, sometimes for a day trip, but usually for a longer period to experience the variety of activities offered by a large urban centre. They may reside in surrounding smaller centres or come from other urban centres.

S. Tours - Group: Group tours refers to touring activity which has been pre-planned by some commercial or semi-commercial agency, usually utilizing a common carrier, and usually involving relatively large groups, the size of which is frequently determined by the capacity of the carrier unit (i.e., a bus).

i. Affinity groups: groups which have some common social or commercial bond (i.e., service clubs).

ii. Special interest group: groups which have a common bond in terms of a special interest (i.e., antique lovers, rock hounds).

iii. General groups: all other tour groups.

T. Auto Touring: This segment consists primarily of individuals or individual family units using the auto for general touring. The tour may or may not be pre-planned, commercial agencies may be used to make accommodation reservations.

i. Domestic: tourists of Canadian origin. They will own their automobile and will tend to do less pre-trip planning.

ii. Overseas: tourists will require essentially the same physical plant as the domestic tourist, but will tend to do more pre-planning, will require more formal information systems, and will usually rent an automobile.

APPENDIX E

SUMMARY OF THE RESOURCE PROTECTION INTERESTS AND JURISDICTIONS OF PROVINCIAL MINISTRIES

SUMMARY OF THE RESOURCE PROTECTION INTERESTS AND JURISDICTIONS OF PROVINCIAL MINISTRIES

This brief summary of the resource protection interests and jurisdictions of provincial ministries is divided into two parts: the first section deals with the natural environment, and the last part deals with historical and cultural resources. You are invited to contact the ministries, through their field offices, for information about regulations and the current status of programs mentioned.

The natural environment is a major attraction drawing visitors to Ontario. Natural features and interesting landscapes form the basis for many of the activities in which travellers participate (e.g., boating, hunting, fishing, skiing, outdoor recreation, viewing, touring, second residences, resort vacations and camping), and also provides the setting which enhances the experience wought by the traveller. Numerous agencies are directly or indirectly concerned with the quality of Ontario's land, shoreline and water resources (the Ministry of the Environment, Ministry of Health, Ministry of Housing, Ministry of Industry and Tourism, Ministry of Natural Resources, Conservation Authorities, Ministry of Treasury, Economics and Intergovernmental Affairs and regional and local municipal councils). An abundance of legislation exists to govern use of the natural environment and to ensure that it is preserved. Table E-1 summarizes, by agency, existing legislation that relates to the preservation and the control of the quality of Ontario's natural resources.

The Ministry of Natural Resources is actively involved in the preservation of public lands and waters. The goal of this Ministry states the intent "to administer, protect and conserve public lands and waters" (Ontario Ministry of Natural Resources, 1975, p. 5). Moreover, the Ministry's dual role in land management is verbalized as follows:

> The first is a custodial role to protect the capability and quality of the 90 percent of Ontario which is public land; the second role is to participate in the planning and control of the total alnd area of the province to ensure harmonious pattern of uses. (Ontario Ministry of Natural Resources, 1976, p. 5)

TABLE E-1

LEGISLATION RELATING TO THE PRESERVATION OF THE NATURAL ENVIRONMENT

MINISTRY OF THE ENVIRONMENT	MINISTRY OF HEALTH	MINISTRY OF HOUSING	MINISTRY OF INDUSTRY AND TOURISM	MINISTRY OF NATURAL RESOURCES	MINISTRY OF TREASURY, ECONOMICS AND INTERGOVERNMENTAL AFFAIRS
Environmental Protection Act Ontario Water Resources Act	Public Health Act	Planning Act	Tourism Act	Beach Protection Act; Beds of Navigable Water Act; Conservation Authorities Act; Endangered Species Act; Game and Fish Act; Lakes and Rivers Improvement Act; Niagara Escarpment Protection Act; Niagara Parks Act; North Georgian Bay Recreation Reserve Act; Provincial Parks Act; Public Lands Act; St. Clair Parkway Commission Act; St. Lawrence Parks Commission Act; Wilderness Areas Act	Local Improvement Act Municipal Act Niagara Escarpment Planning and Development Act Parkway Belt Planning Act

Additional examples of programs and activities that illustrate the Ministry's environmental involvement are the Provincial Parks program, the Strategic Land Use Plan, Sensitive Areas studies, hazard land mapping, and Wildlife and Fisheries Management programs, among sundry others. These programs have been discussed at length in Chapter II. The Provincial Parks program seeks to preserve significant natural landscapes and environments, while providing outdoor recreation opportunities. The Sensitive Areas study involves the identification of landscapes containing "features whose preservation is the major theme of management" (Ontario Ministry of Natural Resources, February, 1975, p. 60).

Table E-1 points out the numerous statutes relating to environmental concerns that are administered by the Ministry of Natural Resources. It should be noted that under the Provincial Parks Act and the Public Lands Act, the Minister may establish zones that designate the nature of the development which is to be permitted in an area and he may regulate and administer the use of public lands accordingly.

The Minister, for example, may "designate areas wherein no resort development may occur except by registered plan of subdivision. In areas without municipal organization the Minister may designate a 'restricted area', which gives him control over building permits and land improvements" (Ontario Ministry of Treasury, Economics and Intergovernmental Affairs, 1975).

The Ministry of the Environment is responsible for the establishment of environmental safeguards; the management of water and waste, and, the development and maintenance of measures intended to restore and enhance Ontario's natural environment. The Environmental Assessment and Planning Division investigates the uses of water, land and air resources to provide factual support of many of the Ministry's policies. In addition, the Division has the responsibilities under the Ontario Water Resources and Environmental Protection Acts regarding waste disposal. The Environmental Protection Act permits this Ministry to control water quality by regulating boat sewerage and general waste management, to prevent litter by means of fines and to issue control or stop orders to reduce or arrest pollution of the natural environment. Legislation contained in the Ontario Water Resources Act appoints the Minister of the Environment as supervisor of the equality of all surface and ground waters. In this capacity, the Minister may regulate marinas to control pollution.

The Ministry of Health, Ministry of Treasury, Economics and Intergovernmental Affairs, Ministry of Housing, and the Ministry of Industry and Tourism are indirectly able to influence the preservation of the natural environment through the regulatory functions which they are assigned under various acts. The Ministry of Health, according to the Public Health Act, can stipulate and enforce sanitary precautions to be taken in health resorts, summer resorts and on boats on inland waters and for preventing pollution of these waters. The Municipal Act, which is administered by T.E.I.G.A., allows municipal councils to preserve shores, harbours, bay and river banks. Powers of approval, which are assigned to the Ministry of Housing by the Planning Act, permit this agency to exercise some control in restricting developments and land uses that could have serious negative environmental impacts.

The Ministry of Industry and Tourism is also vitally concerned that the natural resources in Ontario are preserved in the interests of tourism and recreation. This Ministry, under current legislation, cannot directly respond to environmental concerns. However, it is assigned approval functions by the Tourism Act which permits the Ministry to supervise development in order to ensure that it is sensitive to environmental concerns. The types of development which are regulated under the Tourism Act include "any premises operated to provide sleeping accommodation for the travelling public, or sleeping accommodation for the use of the public engaging in recreational activities, and includes the services and facilities in connection with which sleeping accommodation is provided" (Ontario Ministry of Industry and Tourism.

Ontario's historical and cultural resources also have tremendous potential for tourism development that will generate visitation. Historical and cultural themes can form the basis for attractions, events, tours and services, and they can create an interesting atmosphere that contributes to the satisfaction derived from the visitation.

Physical evidence of historical and cultural or ethnic themes includes buildings or structures of a particular architectural style or of historical significance and historical or cultural landscapes that provide the physical context for attractions and events. These landscapes contain tangible remnants of present or past human activities and life styles (e.g., building ruins or foundations, technological features such as fences, roads and

bridges, modifications in the natural landscape in the form of clearings or cropland). Since the historical or cultural environment, like the natural environment, is extremely important to tourism, similar efforts must be made to preserve these features and landscapes.

Historical and cultural environments with high potential for tourist visitation, together with preservation directions, have been previously presented in Chapter II. It appears, that for tourism purposes, the preservation of areas in which features are concentrated rather than the preservation of single, scattered buildings or structures is the key. This principle is espoused in the definition of heritage conservation districts by Heritage Canada. Their potential list of districts includes Amherstbury, Ancaster, Kingston, Niagara-on-the-Lake, Ottawa's Lower Town, Perth, Petrolia, Port Hope and Prescott.

The many agencies which are working toward the preservation of our historical and cultural environment are concerned with both landscapes and single features. These agencies include the Ministry of Culture and Recreation and affiliated organizations (the Ontario Heritage Foundation and Local Architectural Conservation Advisory Committees), the Ministry of Natural Resources and affiliated bodies (the Niagara and the St. Lawrence Parks Commissions and Conservation Authorities), the federal Department of Indian and Northern Affairs and Heritage Canada, an independent organization. The roles of these agencies is outlined in detail in Chapter II. Table E-2 provides a list of the legislation under which they operate.

TABLE E-2

LEGISLATION RELATING TO THE PRESERVATION OF HISTORICAL AND CULTURAL ENVIRONMENTS

Ontario Ministry of Culture and Recreation	
Ontario Heritage Act	- Ontario Heritage Foundation Local Architectural Conservation Advisory Committee
Ontario Ministry of Natural Resources	
Provincial Parks Act	
Niagara Parks Act	- Niagara Parks Commission
St. Lawrence Parks Act	- St. Lawrence Parks Commission
Department of Indian Affairs and Northern Development (federal)	
Agreement for Recreation and Conservation (A.R.C.)	
Historic Sites and Monuments Act	

APPENDIX F

COLLECTION OF RESOURCE COMPONENT SYNTHESIS INFORMATION USED TO PREPARE TRANSPARENT OVERLAYS AND, SUBSEQUENTLY, TO IDENTIFY ZONES

1. Natural resource capability for intensive and extensive recreation use: Figure F-1 and Figure F-2.
2. Proximity to major population concentrations: Figure F-3.
3. Transportation links: Figure F-4, Figure F-5, Figure F-6, Figure F-7 and Figure F-8.
4. Historical/cultural events and attractions: Figure F-9 and Figure F-10.
5. Administrative boundaries: Figure F-11.
6. Physiographic regions: Figure F-12.
7. Accommodations: Figure F-13, Figure F-14, Figure F-15 and Figure F-16.

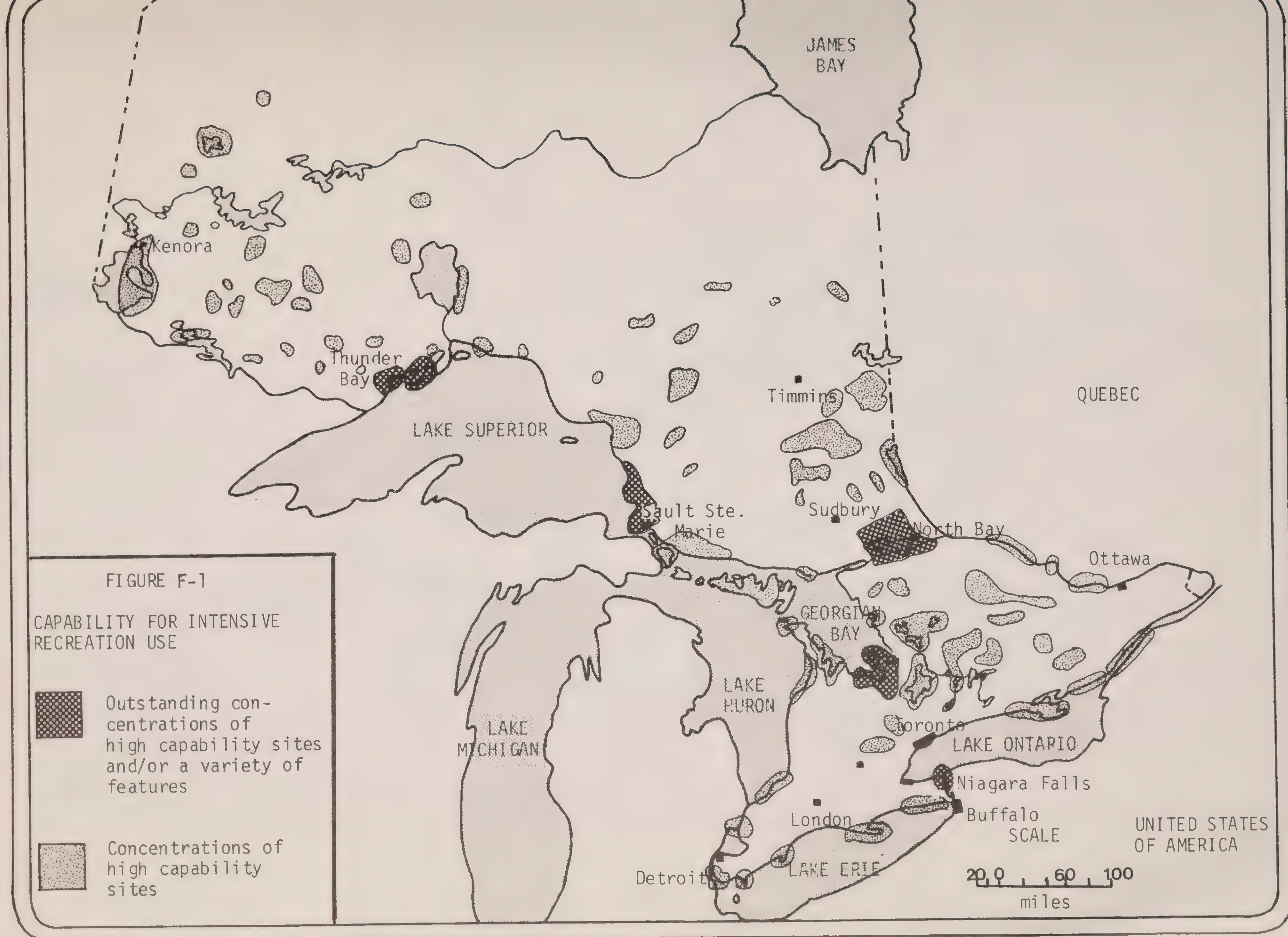


FIGURE F-1

CAPABILITY FOR INTENSIVE RECREATION USE

FIGURE F-2
CAPABILITY FOR EXTENSIVE RECREATION USE

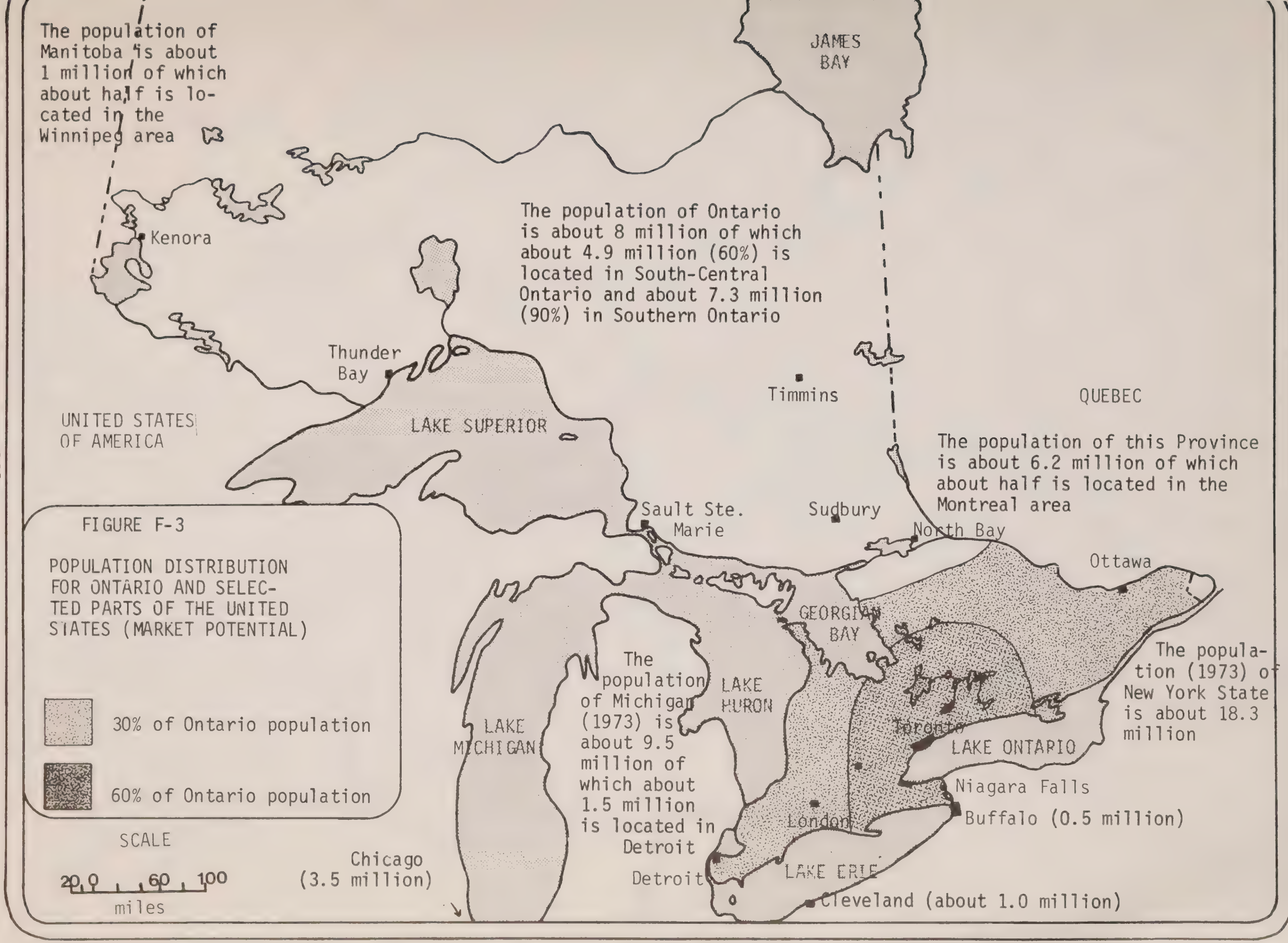


FIGURE F-3

POPULATION DISTRIBUTION FOR ONTARIO AND SELECTED PARTS OF THE UNITED STATES (MARKET POTENTIAL)

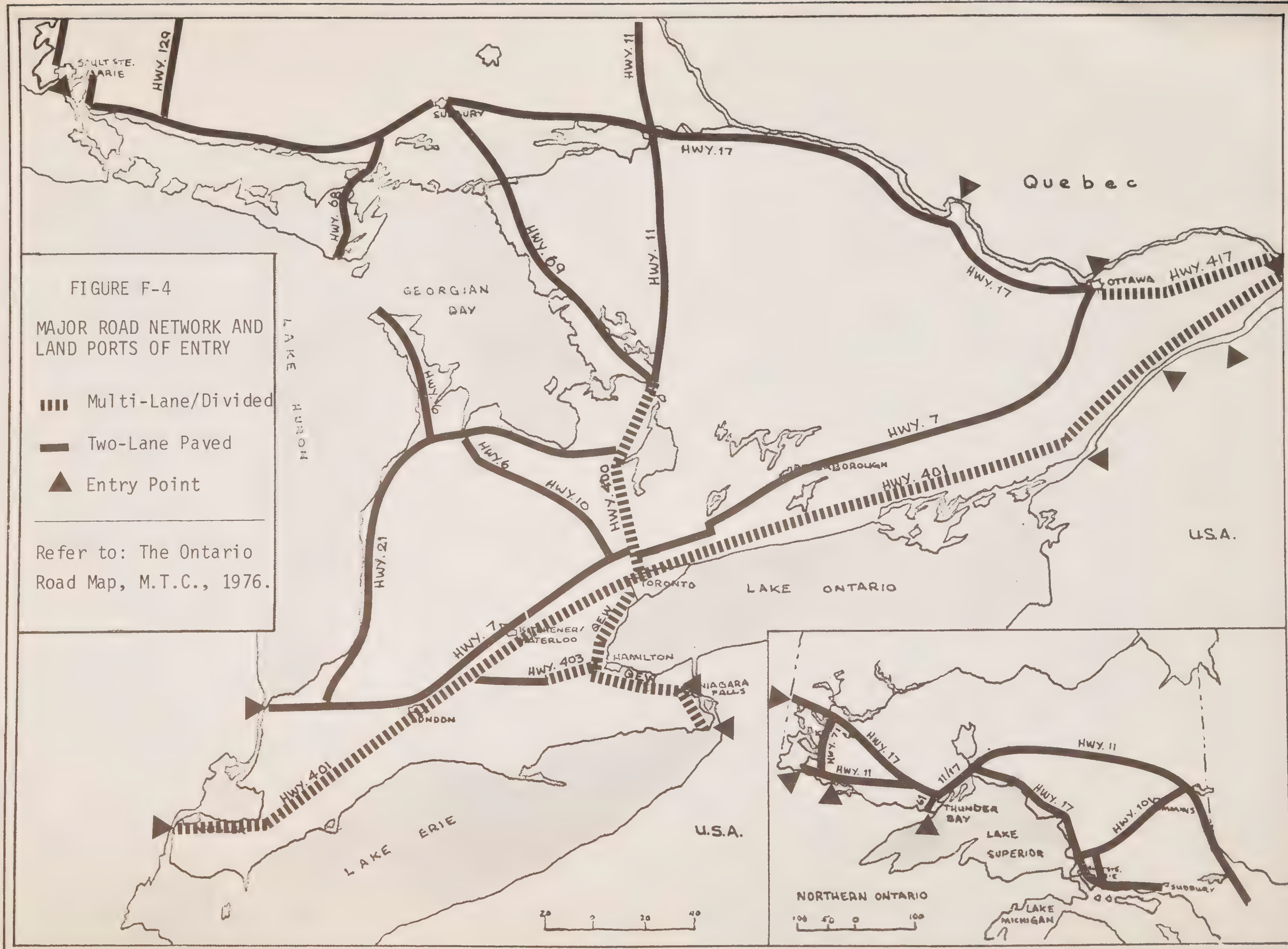


FIGURE F-4

MAJOR ROAD NETWORK AND LAND PORTS OF ENTRY

Multi-Lane/Divided

Two-Lane Paved

Entry Point

Refer to: The Ontario Road Map, M.T.C., 1976.

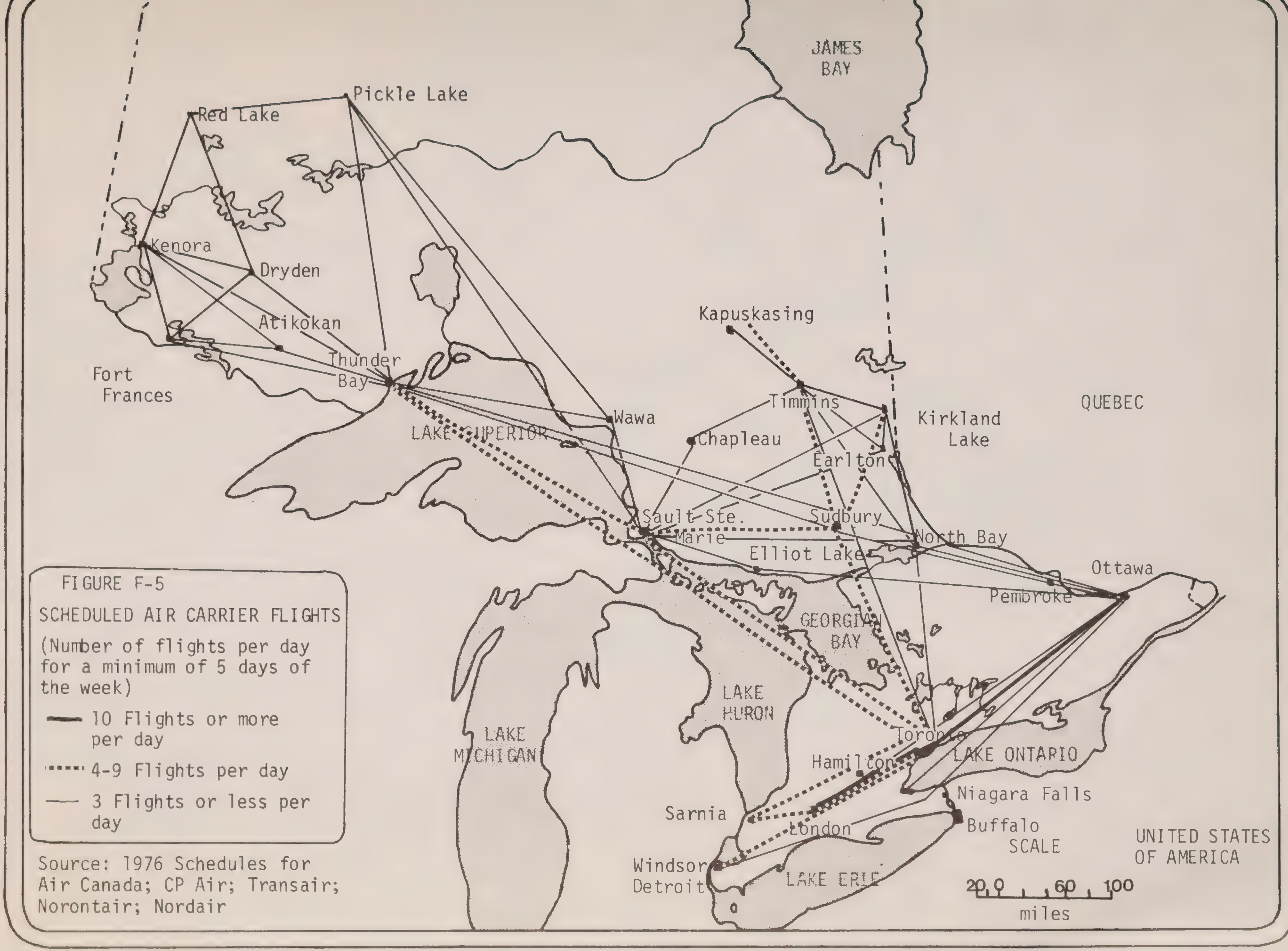


FIGURE F-5

SCHEDULED AIR CARRIER FLIGHTS

(Number of flights per day for a minimum of 5 days of the week)

- 10 Flights or more per day
- 4-9 Flights per day
- 3 Flights or less per day

Source: 1976 Schedules for Air Canada; CP Air; Transair; Norontair; Nordair

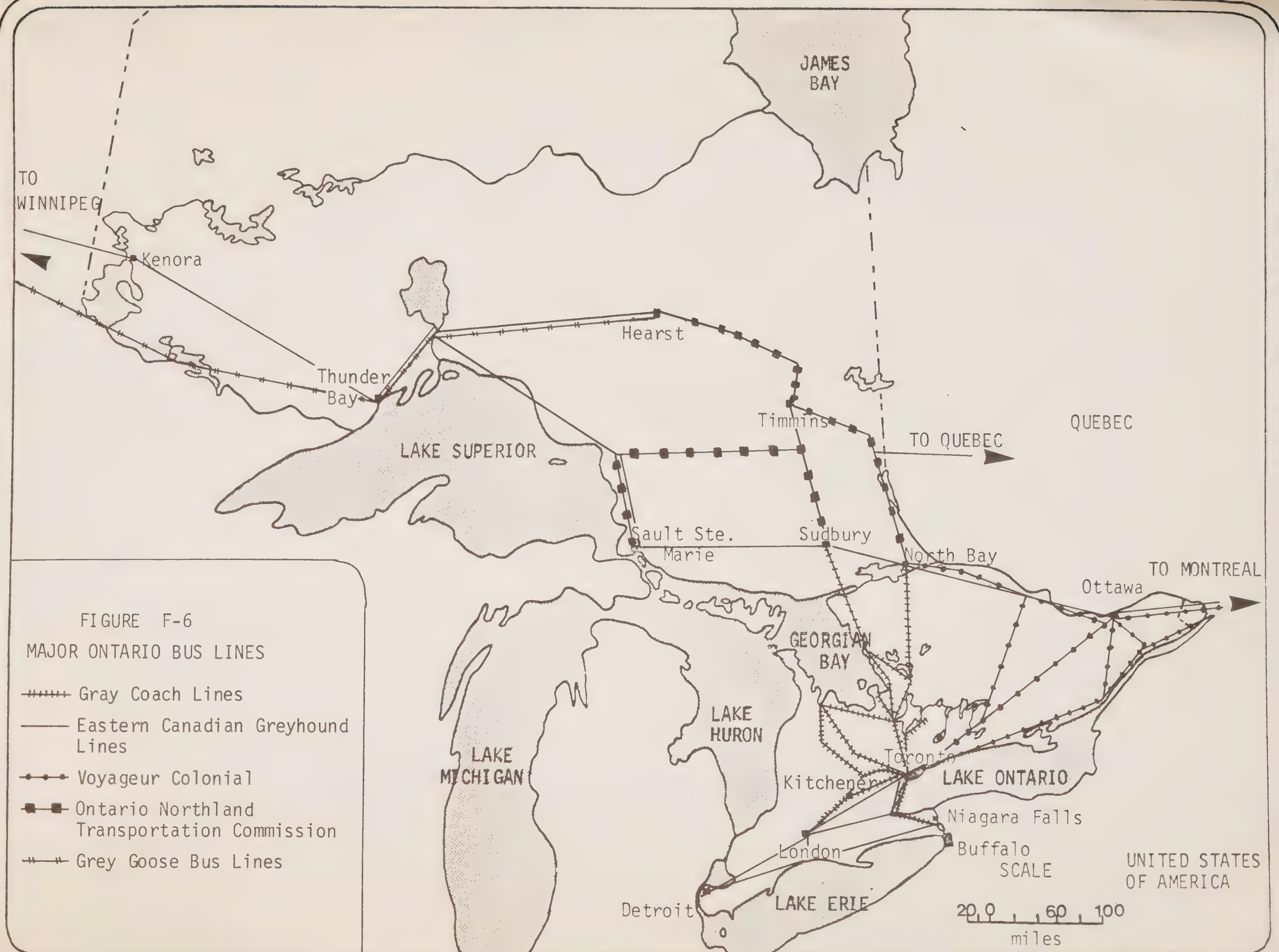


FIGURE F-6

MAJOR ONTARIO BUS LINES

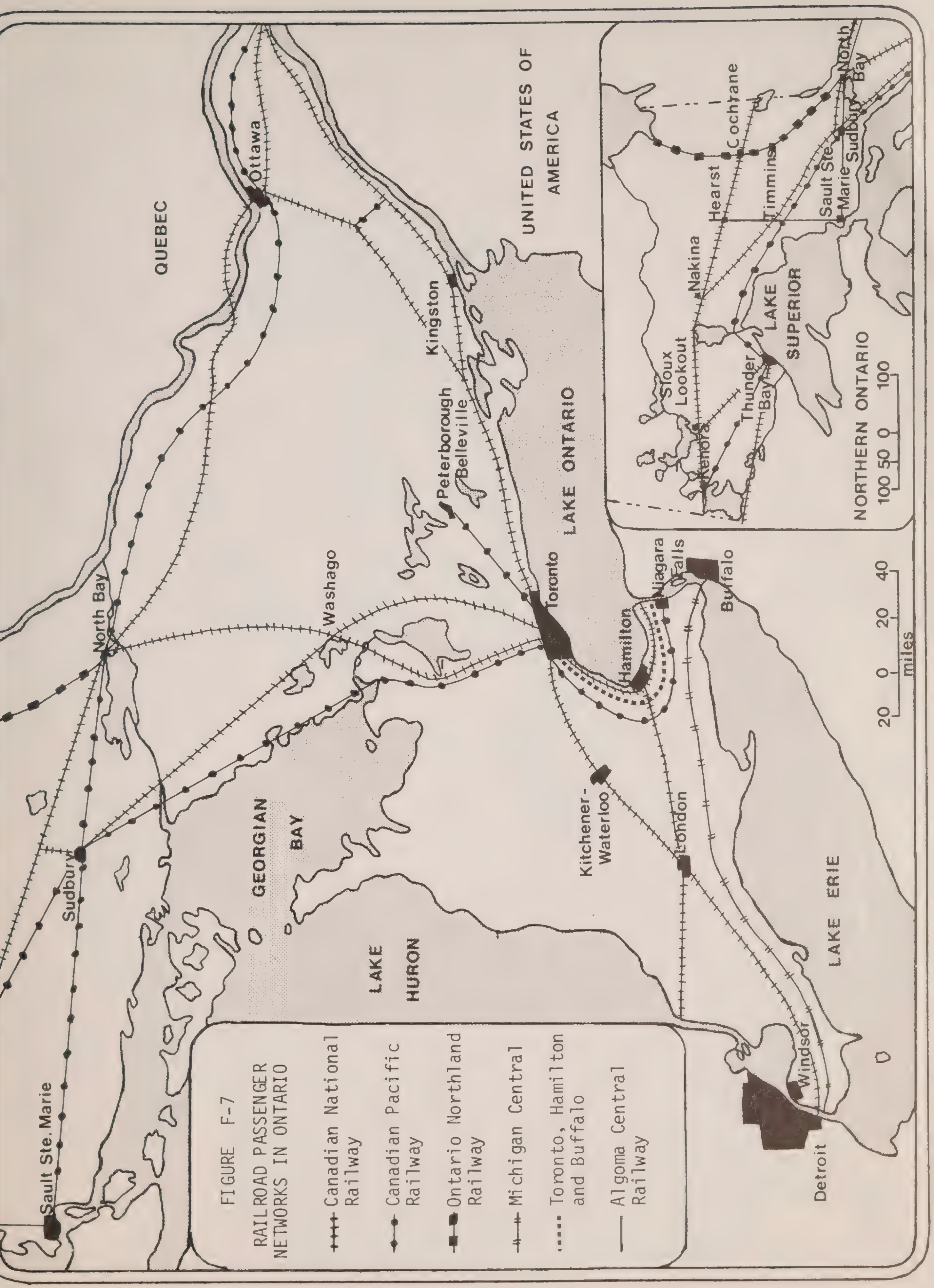


FIGURE F-7
RAILROAD PASSENGER NETWORKS IN ONTARIO

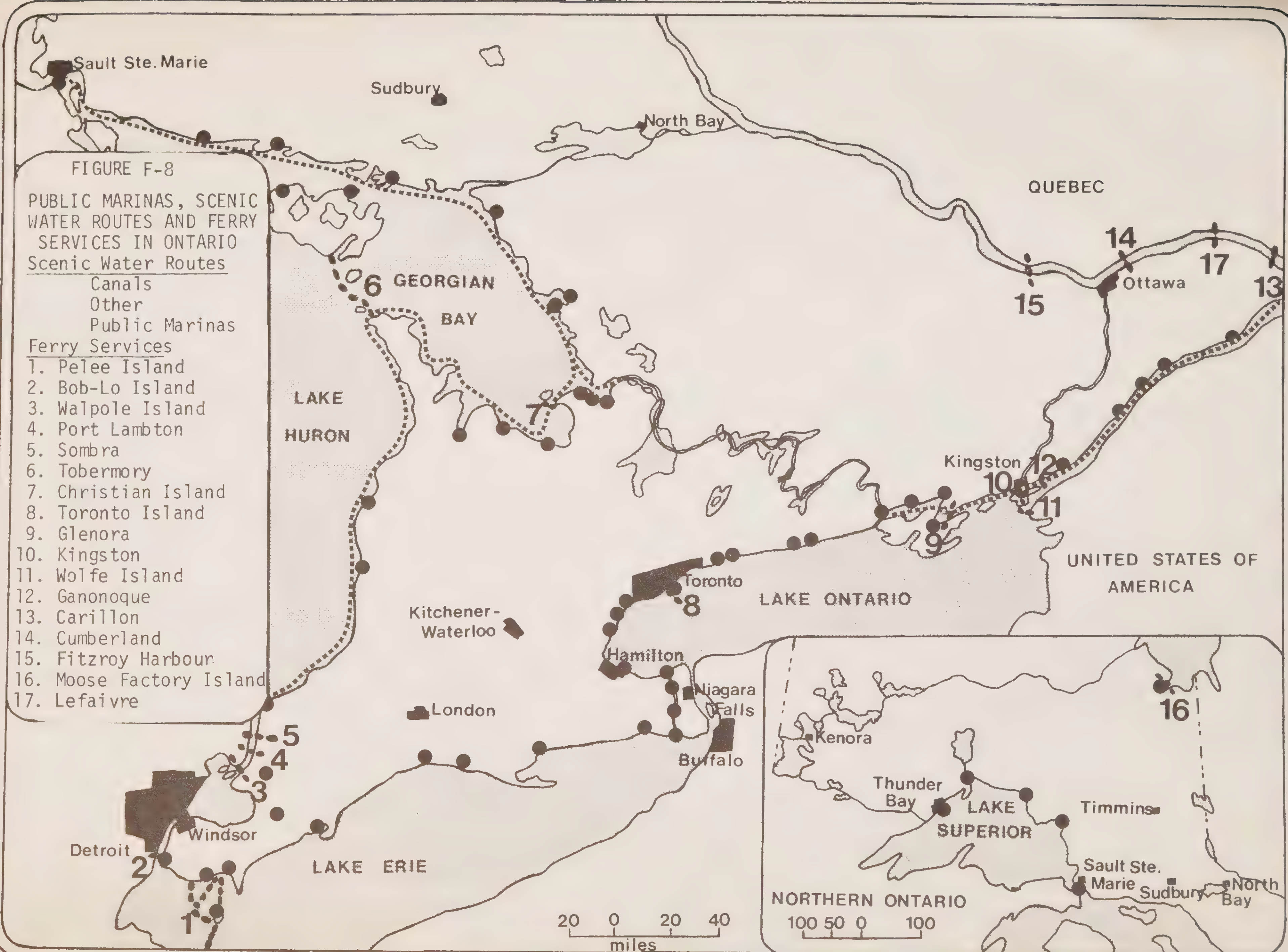


FIGURE F-8
PUBLIC MARINAS, SCENIC WATER ROUTES AND FERRY SERVICES IN ONTARIO
Scenic Water Routes
Canals
Other
Public Marinas
Ferry Services
1. Pelee Island
2. Bob-Lo Island
3. Walpole Island
4. Port Lambton
5. Sombra
6. Tobermory
7. Christian Island
8. Toronto Island
9. Glenora
10. Kingston
11. Wolfe Island
12. Ganonoque
13. Carillon
14. Cumberland
15. Fitzroy Harbour
16. Moose Factory Island
17. Lefaivre
Sault Ste. Marie
Sudbury
North Bay
QUEBEC
Ottawa
GEORGIAN BAY
LAKE HURON
Kingston
UNITED STATES OF AMERICA
Toronto
LAKE ONTARIO
Kitchener-Waterloo
Hamilton
Niagara Falls
Buffalo
London
Windsor
Detroit
LAKE ERIE
20 0 20 40
miles
Kenora
Thunder Bay
LAKE SUPERIOR
Timmins
Sault Ste. Marie
Sudbury
North Bay
NORTHERN ONTARIO
100 50 0 100

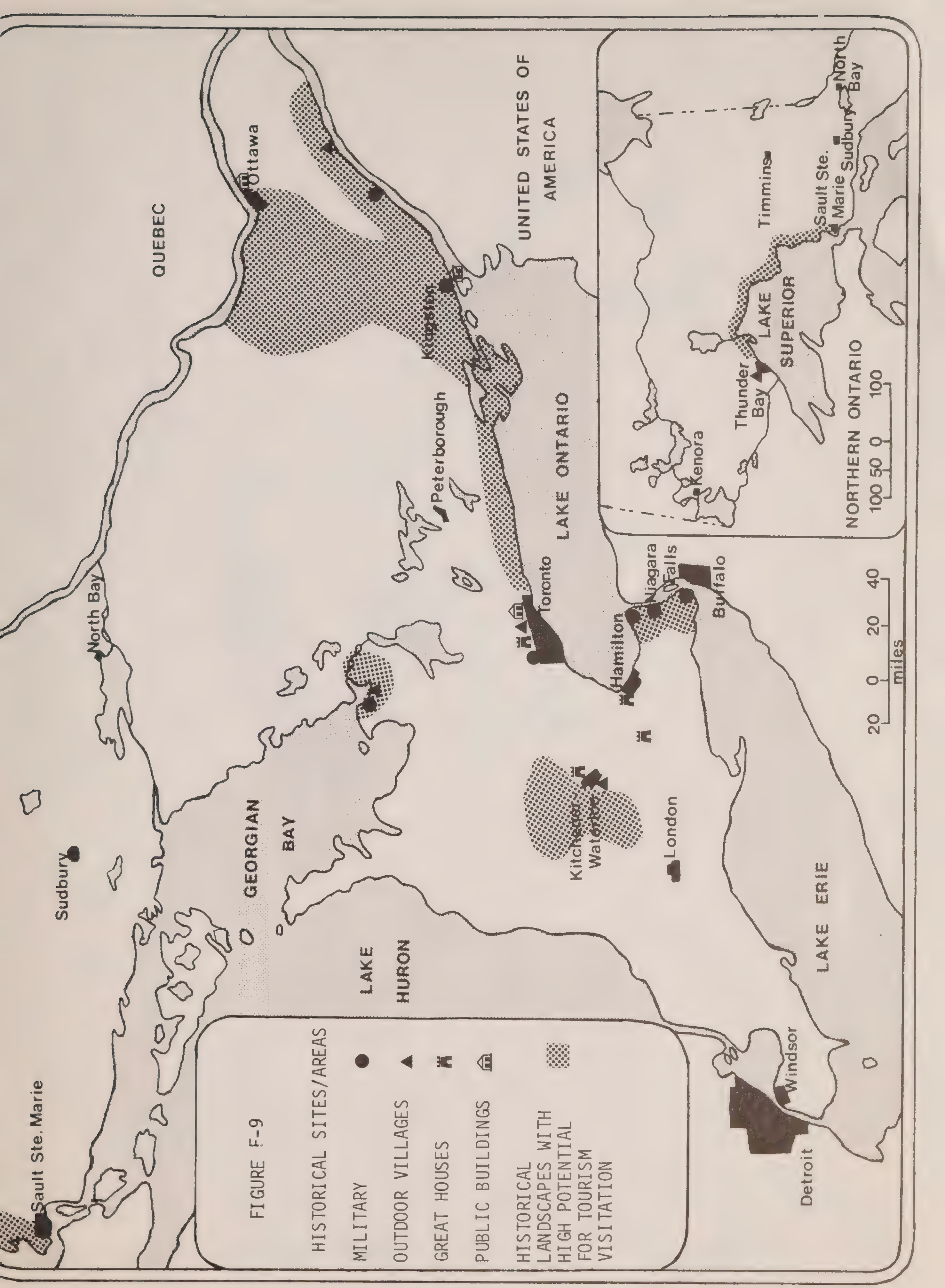


FIGURE F-9
HISTORICAL SITES/AREAS
MILITARY
OUTDOOR VILLAGES
GREAT HOUSES
PUBLIC BUILDINGS
HISTORICAL LANDSCAPES WITH HIGH POTENTIAL FOR TOURISM VISITATION
QUEBEC
UNITED STATES OF AMERICA
Ottawa
Kingston
Peterborough
Toronto
Hamilton
Niagara Falls
Buffalo
Kitchener Waterloo
London
Windsor
Detroit
Sudbury
North Bay
Sault Ste. Marie
GEORGIAN BAY
LAKE HURON
LAKE ERIE
LAKE ONTARIO
20 0 20 40
miles
NORTHERN ONTARIO
100 50 0 100
Kenora
Thunder Bay
LAKE SUPERIOR
Timmins
Sault Ste. Marie
Sudbury
North Bay

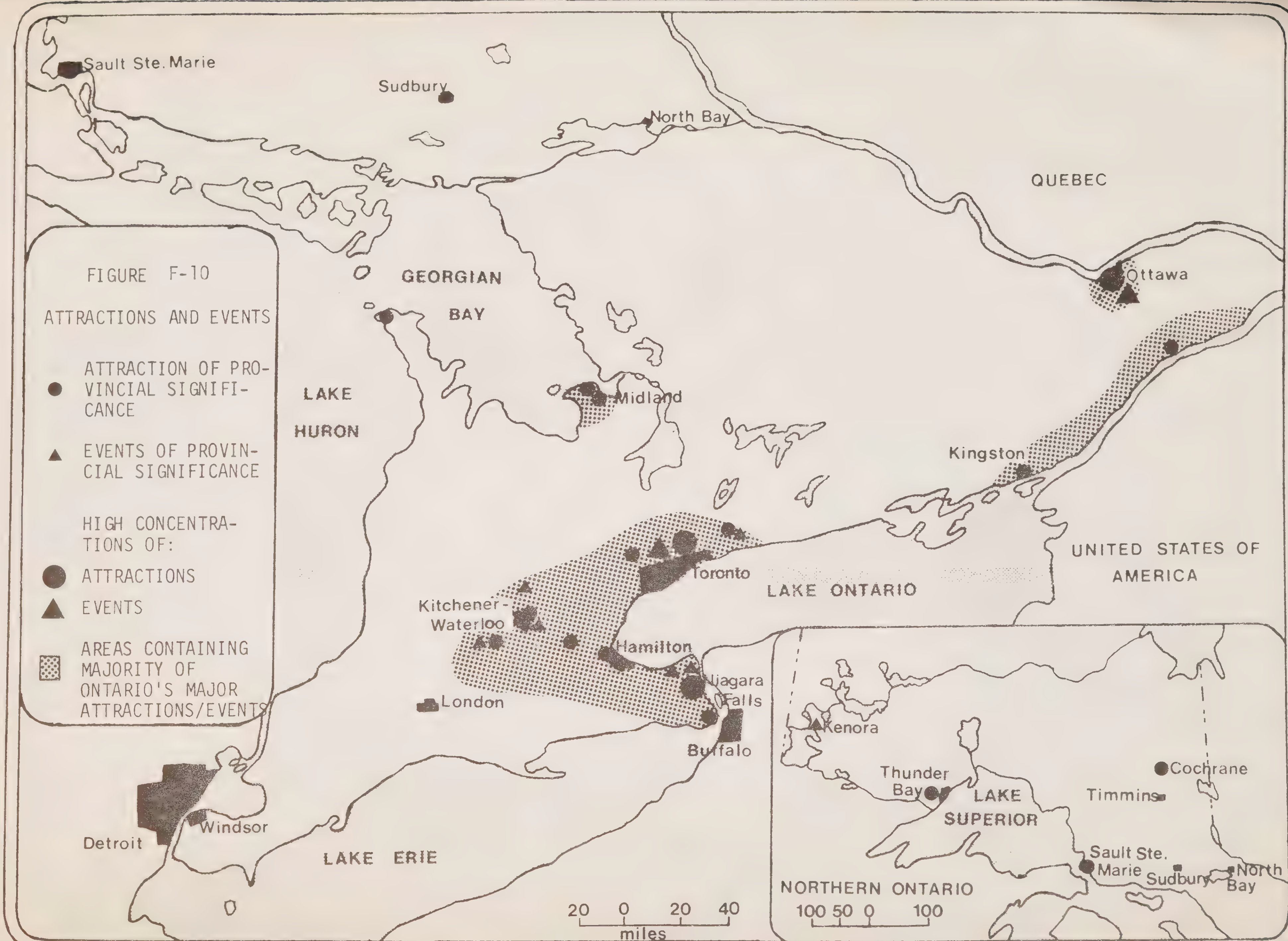


FIGURE F-10

ATTRACTIONS AND EVENTS

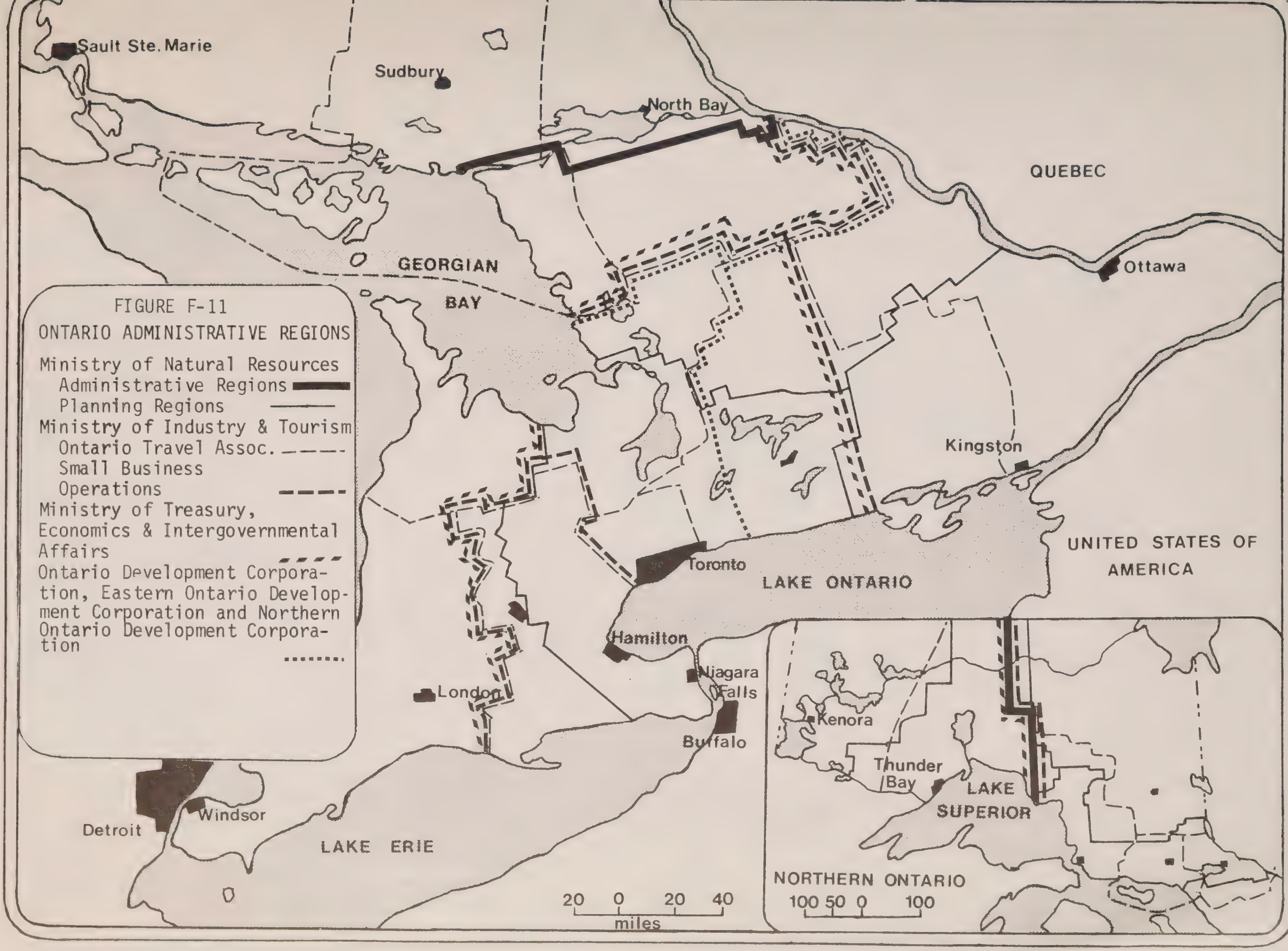


FIGURE F-11

ONTARIO ADMINISTRATIVE REGIONS

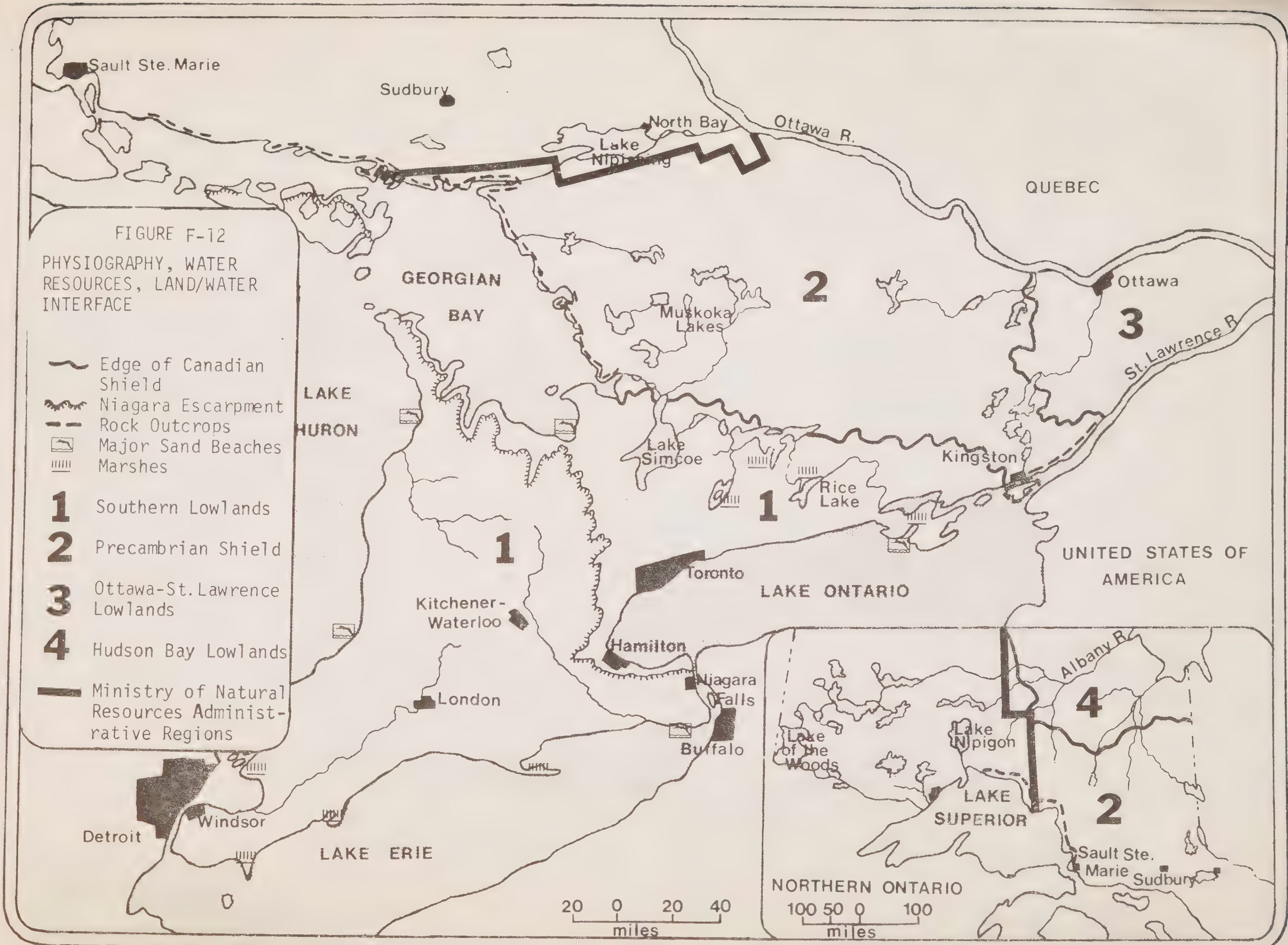


FIGURE F-12
PHYSIOGRAPHY, WATER RESOURCES, LAND/WATER INTERFACE
Edge of Canadian Shield
Niagara Escarpment
Rock Outcrops
Major Sand Beaches
Marshes
1 Southern Lowlands
2 Precambrian Shield
3 Ottawa-St.Lawrence Lowlands
4 Hudson Bay Lowlands
Ministry of Natural Resources Administrative Regions
Sault Ste. Marie
Sudbury
North Bay
Lake Nipissing
Ottawa R.
QUEBEC
Ottawa
St. Lawrence R.
GEORGIAN BAY
LAKE HURON
Muskoka Lakes
Lake Simcoe
Rice Lake
Kingston
UNITED STATES OF AMERICA
Toronto
LAKE ONTARIO
Kitchener-Waterloo
Hamilton
Niagara Falls
Buffalo
London
Detroit
Windsor
LAKE ERIE
20 0 20 40
miles
Albany R.
Lake Nipigon
Lake of the Woods
LAKE SUPERIOR
Sault Ste. Marie
Sudbury
NORTHERN ONTARIO
100 50 0 100
miles

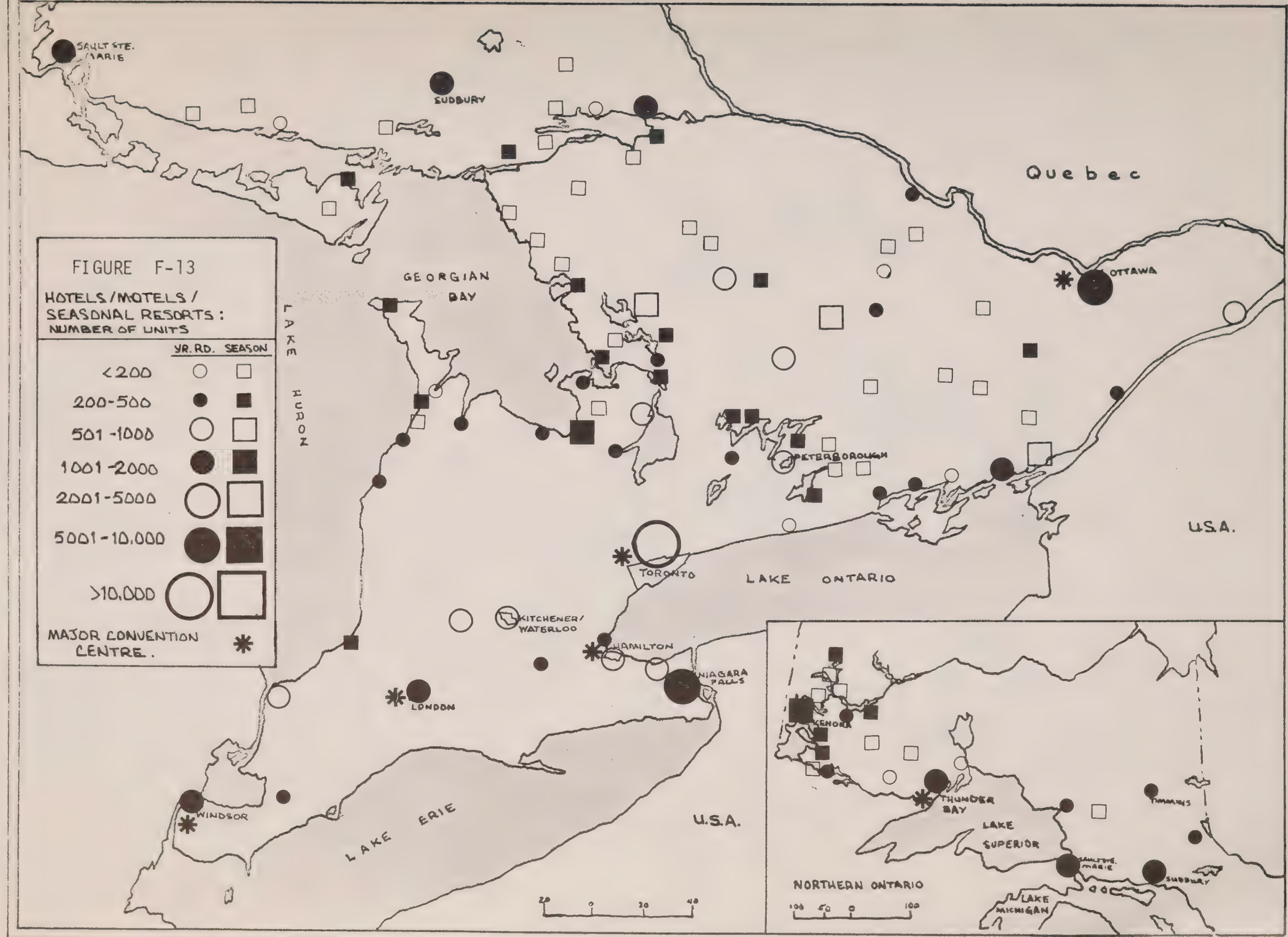
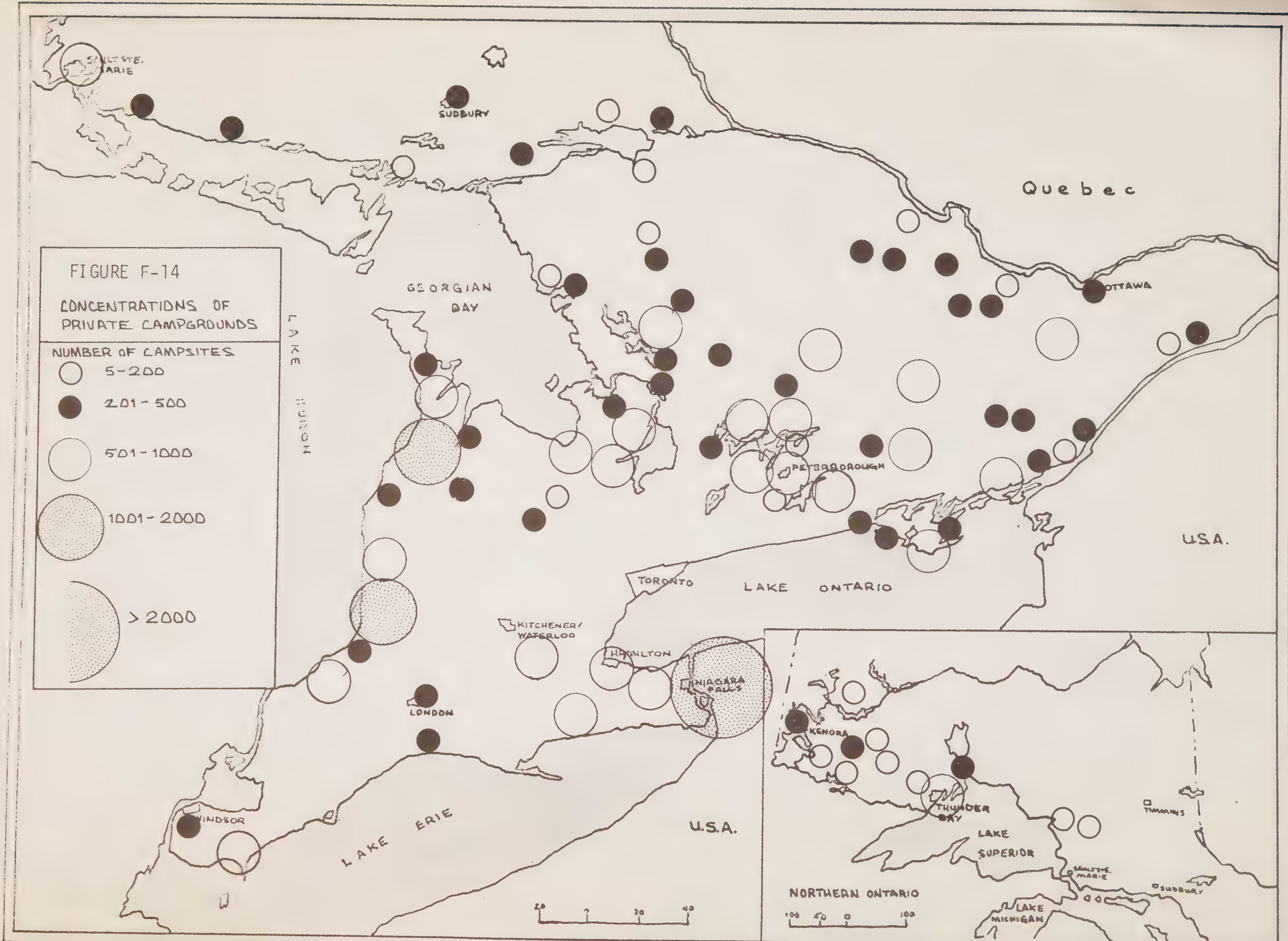


FIGURE F-13
HOTELS/MOTELS/SEASONAL RESORTS: NUMBER OF UNITS
YR. RD.
SEASON
<200
200-500
501-1000
1001-2000
2001-5000
5001-10,000
>10,000
MAJOR CONVENTION CENTRE.
SAULT STE. MARIE
SUDBURY
Quebec
OTTAWA
GEORGIAN BAY
LAKE HURON
PETERBOROUGH
TORONTO
LAKE ONTARIO
U.S.A.
KITCHENER/WATERLOO
HAMILTON
NIAGARA FALLS
LONDON
WINDSOR
LAKE ERIE
U.S.A.
20 0 20 40
KENORA
THUNDER BAY
LAKE SUPERIOR
TIMMINS
SAULT STE. MARIE
SUDBURY
LAKE MICHIGAN
NORTHERN ONTARIO
100 50 0 100



Source: Ministry of Industry and Tourism, 1975

FIGURE F-15

PROVINCIAL PARKS IN ONTARIO

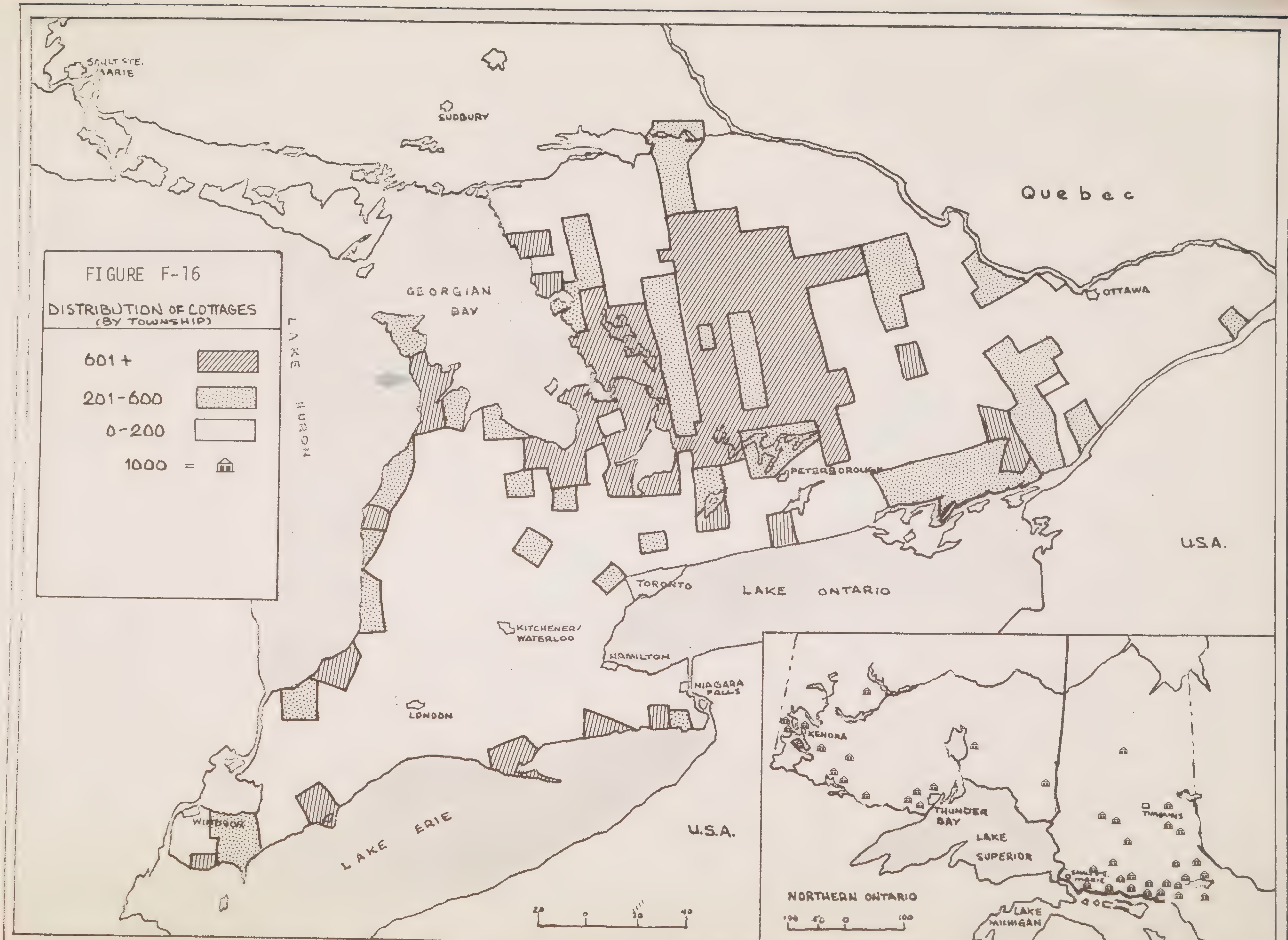


FIGURE F-16
DISTRIBUTION OF COTTAGES (BY TOWNSHIP)
601+
201-600
0-200
1000 =
Quebec
OTTAWA
SUDBURY
SAULT STE. MARIE
GEORGIAN BAY
LAKE HURON
PETERBOROUGH
TORONTO
LAKE ONTARIO
KITCHENER/ WATERLOO
HAMILTON
NIAGARA FALLS
LONDON
WINDSOR
LAKE ERIE
U.S.A.
U.S.A.
KENORA
THUNDER BAY
LAKE SUPERIOR
TIMMINS
LAKE MICHIGAN
NORTHERN ONTARIO
100 50 0 100
20 0 20 40

APPENDIX G

COMPARISONS OF ZONES ON SELECTED CRITERIA

In the process of identifying zone boundaries and priorizing zones for development potential related activities, six categories of information were collected:

A. Current Use and Expenditures
B. Accessibility from Major Markets
C. Current Development
D. Potential for Year-Round Development
E. Complaints by Visitors
F. Total Population in the Zone

Since the collected information may be of value in the comparison of zones for purposes other than formulating a framework of physical plant development, it is presented in Table G-1. The criteria used to assign the 5 level rank values are described in the following discussion.

A. Current Use and Expenditures

Ontario Recreation Survey - Trips (000's)

Vacation--ranks	1	2	3	4	5
Number	100-115	85-100	35-50	15-30	15
Weekend--ranks	1	2	3	4	5
Number	240-275	165-200	90-125	35-70	1-35

- Party Nights (000's)

Vacation--ranks	1	2	3	4	5
Number	1100-1350	450-600	300-450	150-300	150
Weekend--ranks	1	2	3	4	5
Number	440-570	340-440	240-340	100-240	10

U.S.A. Auto Exit (000's)

Parties--rank	1	2	3	4	5
Number	2400-2600	450-600	300-450	150-300	150
Party Nights	1	2	3	4	5
Number	1100-13000	950-1100	450-550	200-350	50-200

Expenditures ($ millions)

Rank	1	2	3	4	5
Ontario	180-195	60-75	30-45	15-29	15
U.S.A.	135-165	65-95	25-45	10-25	10
Other Provinces	35-45	25-35	15-25	5-15	5

B. Accessibility from Major Markets

1. Distance from major population concentrations in Canada and the United States:
   Weekend (critical limit - 200 road miles)
   Vacation (critical limit - 500 road miles)
2. Number of centres that can be reached without transfer from each major centre in the zone by mode of transportation:

AIR-Number of Nodes	0	1-4	5-10	10-14	14+
Rank	5	4	3	2	1
RAIL-Number of Nodes	1-4	5-8	9-13	14-18	19+
Rank	5	4	3	2	1
BUS-Number of Nodes	1-4	5-8	9-13	14-18	19+
Rank	5	4	3	2	1

3. Status of airport at major service centre:

International	Interprovincial	Provincial	Regional	Other
1	2	3	4	5

C. Current Development

Accommodation:

Year-round (hotels/motels) Units

Units	500	500-2000	2001-5000	5001-10,000	10,000
Rank	5	4	3	2	1

Seasonal Resort Units

Units	500	500-1000	1001-2000	2001-5000	5001+
Rank	5	4	3	2	1

Private Campsites

Units	5-200	201-500	501-1000	1001-2000	2000
Rank	5	4	3	2	1

Support Services: based on category of service centres in zone

local	area	regional	sub-provincial	provincial
(primarily direct services)			direct and indirect services wholesaling, etc.)	
5	4	3	2	1

D. Potential for Year-Round Development

Subjective evaluation based upon winter access; existing year-round accommodation; attractions/events and propensity for utilization in winter; existing or potential for winter and shoulder season activities; distance to major markets; desire of operators to extend season.

	Little Potential		Some Potential		Considerable Potential
Rank	5	4	3	2	1

E. Complaints by Visitors (Unranked)

The number of complaints are relevant only in relation to the number of visitors (requires weighting).

The type of complaint relates to the type of facility development found in the zone.

Listed by type of complaint:

- .Accommodation conditions
- .Accommodation overcharge
- .Camping
- .Outfitters
- .Miscellaneous (e.g., restaurants, anti-Americanism, customs, etc.)

TABLE G-1

COMPARISONS OF ZONES ON SELECTED CRITERIA
(RANKINGS ARE ENCLOSED IN PARENTHESES)

CRITERIA	Windsor-Point Pelee	Sarnia-Bayfield	Niagara-Brantford	Kitchener-Stratford	Toronto	Bruce Peninsula	Collingwood-Midland-Orillia	Parry Sound-Huntsville-Barrie	Peterborough-Haliburton	Trenton-Cornwall	Renfrew-Kingston	Ottawa	North Bay	Sudbury	Sault Ste. Marie-Wawa	Thunder Bay	Kenora-Rainy River
	TOURISM DEVELOPMENT ZONE																
A. CURRENT USE AND EXPENDITURES (000's)																	
Ontario Recreation Survey																	
1. Vacation Trips	9 (5)	10 (5)	37 (3)	5 (5)	42 (3)	43 (3)	47 (3)	112 (1)	94 (2)	28 (4)	17 (4)	25 (4)	12 (5)	12 (5)	13 (5)	8 (5)	6 (5)
2. Weekend Trips	51 (4)	26 (5)	197 (2)	91 (3)	246 (1)	123 (3)	173 (2)	270 (1)	265 (1)	118 (3)	39 (4)	68 (4)	37 (4)	37 (4)	21 (5)	20 (5)	5 (5)
3. Vacation Party Nights	83 (5)	162 (4)	273 (4)	63 (4)	449 (3)	387 (3)	545 (2)	1308 (1)	1108 (1)	499 (2)	212 (4)	227 (4)	121 (5)	121 (5)	116 (5)	64 (5)	45 (5)
4. Weekend Party Nights	110 (4)	50 (5)	369 (2)	159 (4)	473 (1)	268 (3)	340 (2)	567 (1)	565 (1)	245 (3)	86 (5)	152 (4)	54 (5)	55 (5)	45 (5)	40 (5)	6 (5)
U.S. Auto Exit (000's)																	
1. Parties	2419 (1)	488 (2)	2567 (1)	27 (5)	594 (2)	30 (5)	48 (5)	73 (5)	50 (5)	397 (3)	100 (5)	81 (5)	18 (5)	18 (5)	240 (4)	25 (5)	190 (5)
2. Party Nights	451 (3)	338 (4)	1267 (1)	96 (5)	1147 (1)	144 (5)	180 (5)	455 (3)	269 (4)	996 (2)	458 (3)	145 (5)	86 (5)	85 (5)	533 (3)	106 (5)	443 (3)
Spending ($,000's)																	
1. Ontario	14 (5)	9 (5)	65 (2)	29 (4)	182 (1)	14 (5)	30 (3)	67 (2)	70 (2)	36 (3)	11 (5)	34 (3)	9 (5)	9 (5)	16 (4)	12 (5)	1 (5)
2. U.S.A.	68 (2)	9 (5)	139 (1)	7 (5)	161 (1)	1 (5)	5 (5)	22 (4)	12 (4)	37 (3)	5 (5)	8 (5)	5 (5)	5 (5)	17 (4)	4 (5)	11 (4)
3. Other Provinces	5 (4)	1 (5)	24 (3)	2 (5)	34 (2)	- (5)	3 (5)	7 (4)	2 (5)	44 (1)	7 (4)	38 (1)	1 (5)	1 (5)	5 (4)	7 (4)	21 (3)

continued . . .

TABLE G-1, continued

CRITERIA	Windsor-Point Pelee	Sarnia-Bayfield	Niagara-Brantford	Kitchener-Stratford	Toronto	Bruce Peninsula	Collingwood-Midland-Orillia	Parry Sound-Huntsville-Barrie	Peterborough-Haliburton	Trenton-Cornwall	Renfrew-Kingston	Ottawa	North Bay	Sudbury	Sault Ste. Marie-Wawa	Thunder Bay	Kenora-Rainy River
	TOURISM DEVELOPMENT ZONE																
C. CURRENT DEVELOPMENT Accommodation																	
Year-Round Units	(4)	(4)	(2)	(4)	(1)	(4)	(4)	(4)	(4)	(3)	(4)	(2)	(4)	(4)	(4)	(4)	(4)
Seasonal Resort Units	(5)	(5)	(3)	-	-	(3)	(3)	(3)	(3)	(4)	(4)	-	(4)	(4)	(4)	(5)	(3)
Private Campgrounds	(3)	(1)	(1)	(3)	(2)	(1)	(1)	(1)	(1)	(1)	(2)	(4)	(4)	(3)	(3)	(3)	(4)
Variety	(3)	(5)	(1)	(3)	(5)	(3)	(3)	(3)	(3)	(3)	(3)	(5)	(3)	(3)	(3)	(3)	(3)
Support Services	(3)	(4)	(3)	(3)	(1)	(4)	(4)	(4)	(4)	(3)	(3)	(2)	(3)	(3)	(3)	(3)	(4)
D. POTENTIAL FOR YEAR-ROUND DEVELOPMENT	(1)	(3)	(1)	(3)	(1)	(4)	(2)	(2)	(4)	(3)	(4)	(2)	(5)	(5)	(3)	(3)	(5)
E. NUMBER OF COMPLAINTS RECEIVED BY THE TOURISM DIVISION, MINISTRY OF INDUSTRY AND TOURISM, ORIGINATING WITHIN EACH ZONE							combined						combined				
Conditions of Accommodation		2	12		11	5	8		2	5	4	3	2		8	2	3
Accommodation Overcharge			16	4	22	2	5		1	1	1	1	4		2	6	4
Camping	2								1		5				2	2	
Outfitters										1			4		1	5	7
Miscellaneous e.g., Restaurants, Anti-Americanism, Customs	1	1	5		7	3	4		1	1	3		4		4	1	3
F. TOTAL POPULATION IN THE ZONE IN 000's	322	188	841	369	2500	102	176	116	245	200	221	507	61	120	128	109	15

TABLE G-1, continued

CRITERIA	Windsor-Point Pelee	Sarnia-Bayfield	Niagara-Brantford	Kitchener-Stratford	Toronto	Bruce Peninsula	Collingwood-Midland-Orillia	Parry Sound-Huntsville-Barrie	Peterborough-Haliburton	Trenton-Cornwall	Renfrew-Kingston	Ottawa	North Bay	Sudbury	Sault Ste. Marie-Wawa	Thunder Bay	Kenora-Rainy River
	TOURISM DEVELOPMENT ZONE																
B. ACCESSIBILITY FROM MAJOR MARKETS																	
<u>Road Distance From Major Markets</u>																	
1. Weekend Trips	(1)	(2)	(1)	(2)	(1)	(3)	(2)	(3)	(3)	(3)	(3)	(4)	(5)	(5)	(5)	(5)	(5)
2. Vacation Trips	(1)	(1)	(1)	(2)	(1)	(2)	(1)	(2)	(2)	(2)	(2)	(3)	(3)	(3)	(3)	(4)	(4)
<u>Number of Centres That Can Be Reached Without Transfer From the Major Centre in the Zone, by Mode of Transportation</u>																	
1. Air	7 (3)	2 (4)	4 (4)	0 (5)	23 (1)	- (5)	0 (5)	0 (5)	0 (5)	0 (2)	0 (2)	13 (2)	2 (4)	5 (3)	7 (3)	4 (4)	4 (4)
2. Bus	4 (5)	2 (5)	8 (4)	5 (4)	19 (1)	- (5)	4 (5)	4 (5)	3 (5)	7 (4)	8 (4)	8 (4)	20 (1)	17 (2)	14 (2)	14 (2)	14 (2)
3. Rail	4 (5)	2 (5)	6 (4)	3 (5)	19 (1)	- (5)	4 (5)	5 (4)	1 (5)	6 (4)	6 (4)	14 (2)	19 (1)	16 (2)	1 (5)	15 (2)	15 (2)
<u>Level of Service Available at Airports</u>	(3)	(3)	(3)	(5)	(1)	(5)	(5)	(5)	(5)	(5)	(5)	(2)	(4)	(3)	(3)	(2)	(4)

continued . . .

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